Chapter

3

Vendor Management

Arizona AIM System

Part II

State Agency User Manual

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Maintain Vendor Application Types

The purpose of this window is to allow the user to maintain the Application Types information. The Application Types and Milestone Type combination determines the “days until due” for Vendor/Application Milestone activities.

To Maintain Vendor Application Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Application Types as shown below:

The Maintain Vendor Application Types window is displayed:

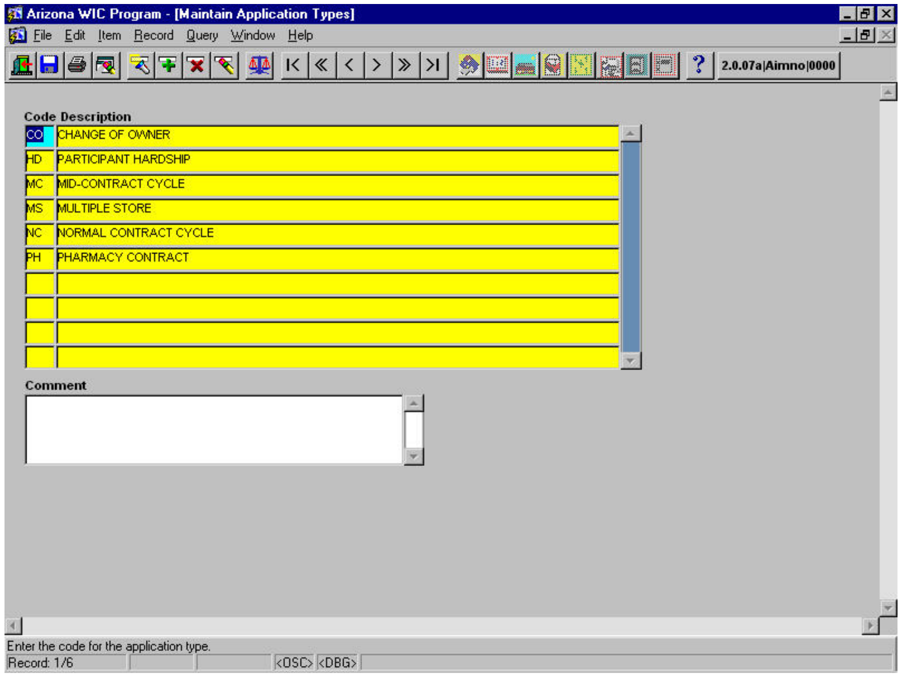


Figure 1 – Maintain Vendor Application Types

Add Vendor Application Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Vendor Application Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields to add a new Vendor Application Type.
3. In the Code field, enter a number for the new Vendor Application Types to be added. If the code you choose is already in use for another Vendor Application Types, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Vendor Application Types.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Vendor Application Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Vendor Application Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Vendor Application Type.
7. Update the Vendor Application Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update."*)
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Vendor Application Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Vendor Application Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Vendor Application Type.
7. Verify that the information being displayed is for the Vendor Application Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Vendor Application Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 1 – Maintain Vendor Application Types

Fields

Code - The user-defined identification for the application type. This field is mandatory.
Description - The description for the application type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Application Milestones

To Maintain Application Milestones:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Application Milestones as shown below:

The Maintain Application Milestones window is displayed:

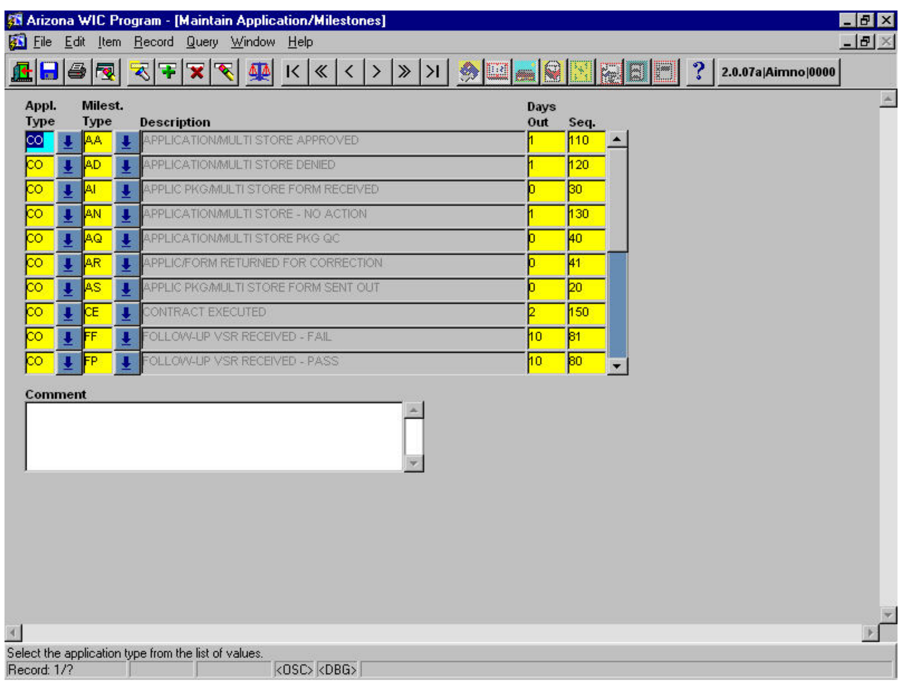


Figure 2 – Maintain Application Milestones

Add a Vendor Application Milestone

1. The System defaults the cursor to highlight the code number under the first entry in the Applicant Type field. The System also displays the Description and any existing Comments for that Vendor Application Milestone.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Applicant Type and Description fields for you to add a new Vendor Application Milestone.
3. In the Applicant Type field, enter a number for the new Vendor Application Milestone to be added. If the code you choose is already in use for another Vendor Application Milestone, the System displays a pop-up window indicating: "Row already exists with same Applicant Type." Click the OK button, delete the Applicant Type inserted, and enter a different one.
4. TAB to the Description field and enter the description of the new Vendor Application Milestone.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Vendor Milestone

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Applicant Type fields.
4. In the appropriate field, enter either the Applicant Type or the Description of the Application Milestone being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Application Milestone.
7. Update the Application Milestone as needed. (*Note: The System will not allow updates to the Applicant Type itself. If attempted, the system will indicate: "Field is protected against update").*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Vendor Milestone

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Applicant Type fields.
4. In the appropriate field, enter either the Applicant Type or the Description of the Vendor Milestone being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Vendor Milestone.
7. Verify that the information being displayed is for the Vendor Milestone to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Vendor Milestone.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 2 – Maintain Application Milestones

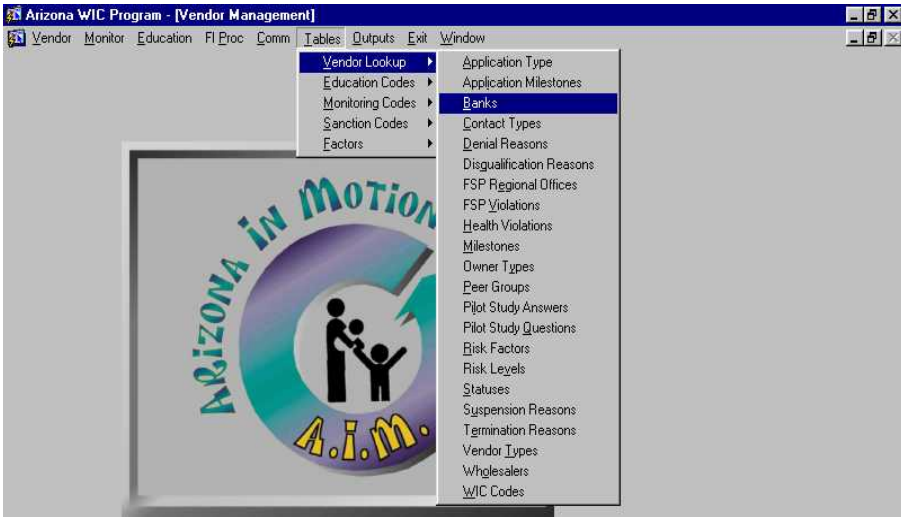
Fields

Application Type - The user-defined identification for the application type. This field is mandatory.
Milestone Type - The user-defined identification for the milestone type. This field is mandatory.
Description - The description for the milestone type. This field is display only.
Days Out - The number of days that can pass before a milestone activity is scheduled to be due. This field is mandatory.
Seq. - The sequence number for the milestone types. This field causes the application/milestone entries to be displayed in a user-specified order.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Banks

To Maintain Banks:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Banks as shown below:



The Maintain Banks window is displayed:

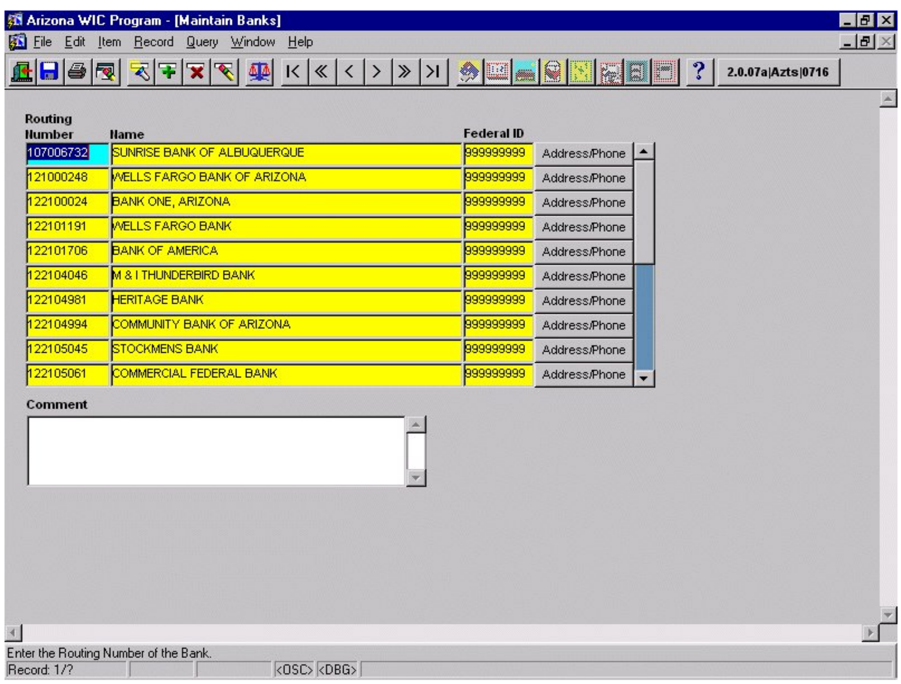


Figure 3 – Maintain Banks

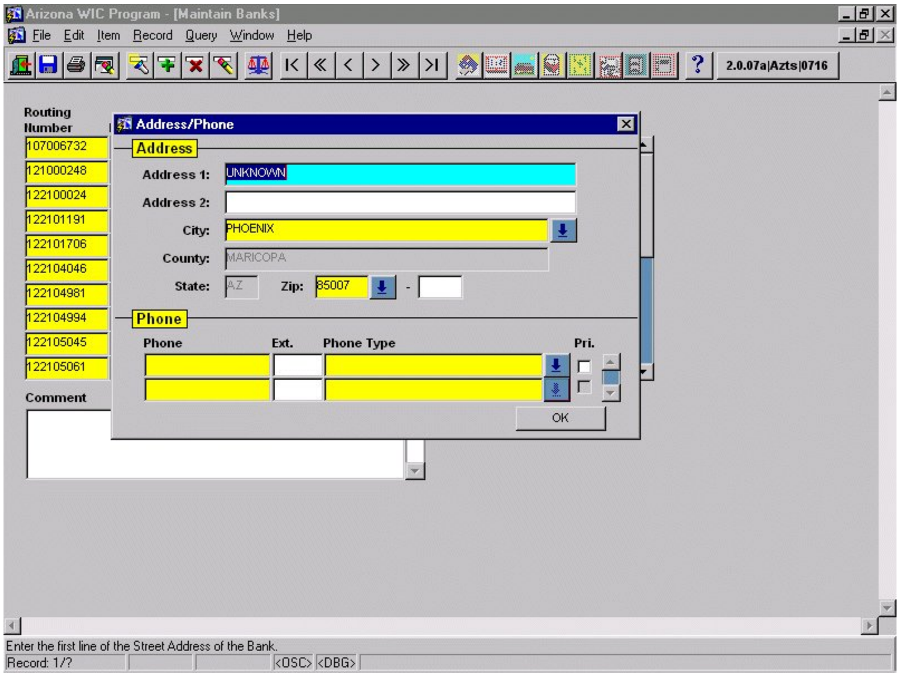


Figure 4 – Maintain Banks (Maintain Bank Address/Phone Pop-up)

Add a Bank

1. The System defaults the cursor to highlight the routing number under the first entry in the Routing Number field. The System also displays the name and federal ID and any existing Comments for that Bank.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Routing Number and Name fields for you to add a new Bank.
3. In the Routing Number field, enter a number for the new Bank to be added. If the Routing Number you choose is already in use for another Bank, the System displays a pop-up window indicating: "Row already exists with same Routing Number." Click the OK button, delete the Routing Number number inserted, and enter a different number.
4. TAB to the Name field and enter the name of the new Bank.
5. TAB to the Federal ID field and enter the Federal ID for the Bank.
6. TAB to the Address/Phone field and enter the address and phone for the Bank being added.
7. TAB to the Comment field and enter any applicable comments.
8. Click the Save icon.
9. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button.

Update a Bank

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Routing Number fields.
4. In the appropriate field, enter either the Routing Number or the Name of the Bank being updated.
5. Press the F8 key or the Query icon to execute the query.
6. TAB to the Federal ID field and enter the Federal ID for the Bank.
7. TAB to the Address/Phone field and enter the address and phone for the Bank being added.
8. The System displays any known data corresponding to this Bank.
9. Update the Bank as needed. (*Note: The System will not allow updates to the Routing Number itself. If attempted, the system will indicate: "Field is protected against update.")*
10. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
11. Click the OK button.

Delete a Bank

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Routing Number fields.
4. In the appropriate field, enter either the Routing Number or the Name of the Bank being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Bank.
7. Verify that the information being displayed is for the Bank to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Bank.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 3 – Maintain Banks

Fields

Routing Number - A ten digit identification number that uniquely identifies a bank. This field is mandatory.
Name - The name of the banking institution accepting WIC food instruments for deposit. This field is mandatory.
Federal ID - A nine character identifier that defines the bank for tax purposes. This field is mandatory.
Comment - The user may provide any comment or remarks. This field is optional.

Push Button(s)

Address/Phone - Brings up the Bank Address/Phone window.

Figure 4 – Maintain Banks (Maintain Bank Address/Phone Pop-up)

Fields (Address section)

Address 1 - The Bank Branch street address. This is a mandatory field.
Address 2 - A continuation of the Bank's street address. This is an optional field.
City - The city in which the Bank is located. This field is mandatory and can be selected from a list of values. Selection of a city will also fill in the state and county information. For more information, please refer to the Locales table in System Administration.
County - The county in which the Bank is located. This field is display only. It will be filled in when a city or zip is selected.
State - The state in which Bank is located. This field is display only. It will be filled in when a city or zip is selected.
Zip - The zip code in which the Bank is located. This field is mandatory and can be selected from a list of values. Selection of a zip will also fill in the county, state and city information. The zip plus 4 can be entered by the user and is optional. For more information, please refer to the Zip Code table in System Administration.

Fields (Phone section)

Phone - The phone number of the Bank. One phone number is required for the Bank; otherwise this field is optional.
Ext. - The extension of the Bank. This field is optional.
Phone Type - The type of phone/telecommunications device. This field is mandatory if Phone is filled in. This field can be chosen from a list of values. For more information, please refer to the Phone Type table in Systems Administration.

Check Boxes

(Pri) Primary Phone - A check box that indicates one of the phone numbers is the primary phone. If at least one Phone is entered, the user must designate one as primary by clicking on the check box to the right of the selected phone number.

Push Button(s)

OK - Closes the window, returning the user to the previous screen or window.

Maintain Contact Types

To Maintain Contact Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Contact Types as shown below:

The Maintain Contact Types window is displayed:

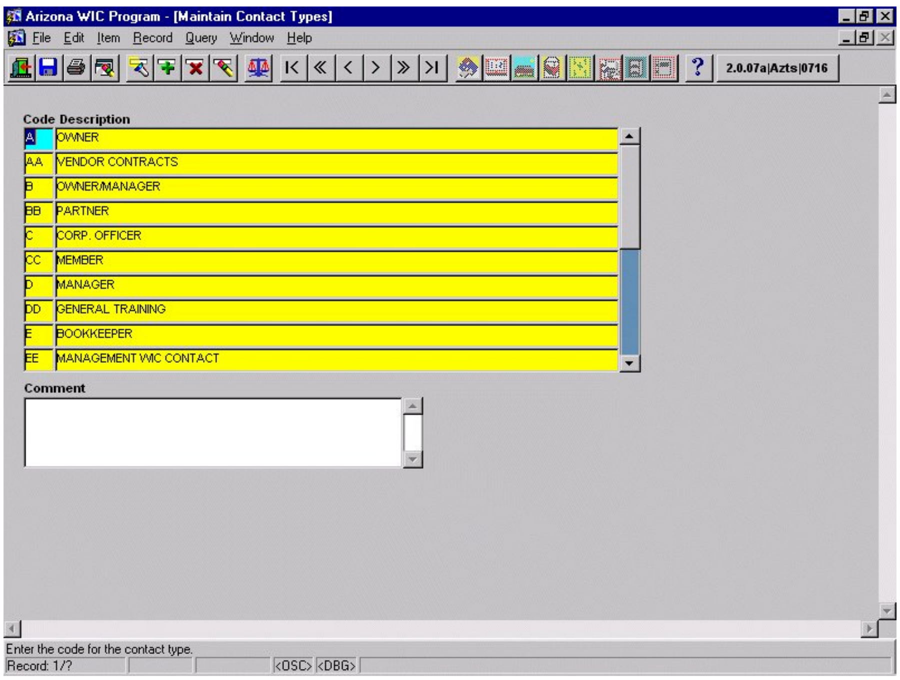


Figure 5 – Maintain Contact Types

Add Contact Type

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Contact Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new contact type.
3. In the Code field, enter a number for the new Contact Type to be added. If the code you choose is already in use for another Contact Type, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Contact Type.
5. TAB to the over percent field and enter the appropriate override percent.
6. TAB to the Comment field and enter any applicable comments.
7. Click the Save icon.
8. The system displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Update a Contact Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Contact Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Contact Type.
7. Update the Contact Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Contact Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Contact Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Contact Type.
7. Verify that the information being displayed is for the Contact Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed”.
10. Click the OK button to successfully delete the Contact Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 5 – Maintain Contact Types

Fields

Code - The user-defined identification for the contact type. This field is mandatory.

Description - The description for the contact type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Denial Reason

To Maintain Denial Reasons:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Denial Reasons as shown below:

The Denial Reasons window is displayed:

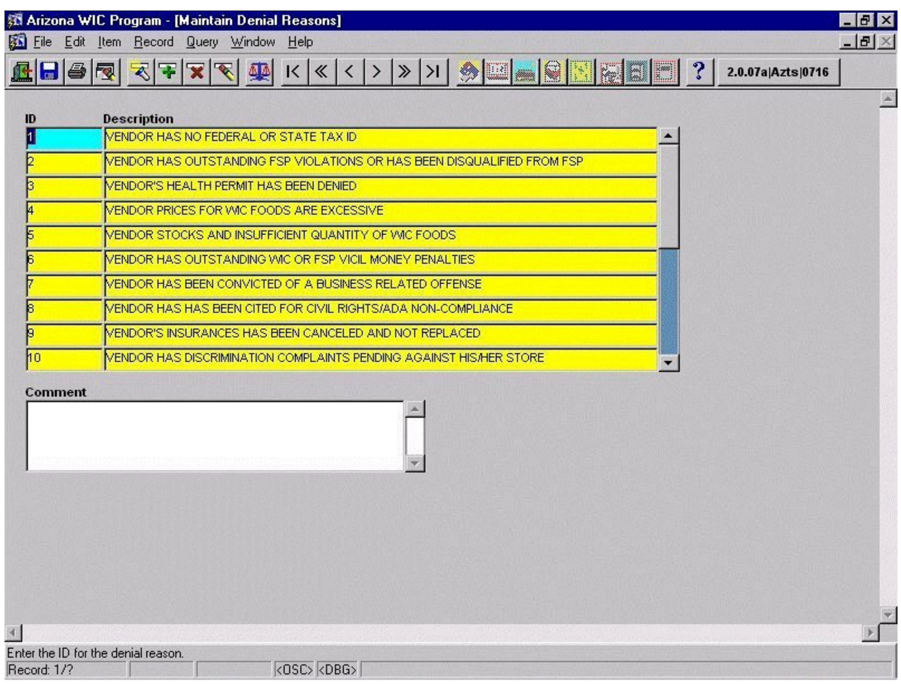


Figure 6 – Maintain Denial Reasons

Add a Denial Reason

1. The System defaults the cursor to highlight the ID under the first entry in the ID field. The System also displays the Description and any existing Comments for that Denial Reason.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the ID and Description fields for you to add a new denial reason.
3. In the ID field, enter a number for the new Denial Reason to be added. If the ID you choose is already in use for another Denial Reason, the System displays a pop-up window indicating: “Row already exists with same ID.” Click the OK button, delete the ID number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Denial Reason.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Denial Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Denial Reason being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Denial Reason.
7. Update the Denial Reason as needed. (*Note: The System will not allow updates to the ID itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Denial Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Denial Reason being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Denial Reason.
7. Verify that the information being displayed is for the Denial Reason to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Denial Reason.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 6 – Maintain Denial Reasons

Fields

ID - The user-defined identification for the denial reason. This field is mandatory.
Description - The description for the denial reasons. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Disqualification Reason

To Maintain Disqualification Reasons:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Disqualification Reasons as shown below:

The Disqualification Reasons window is displayed:

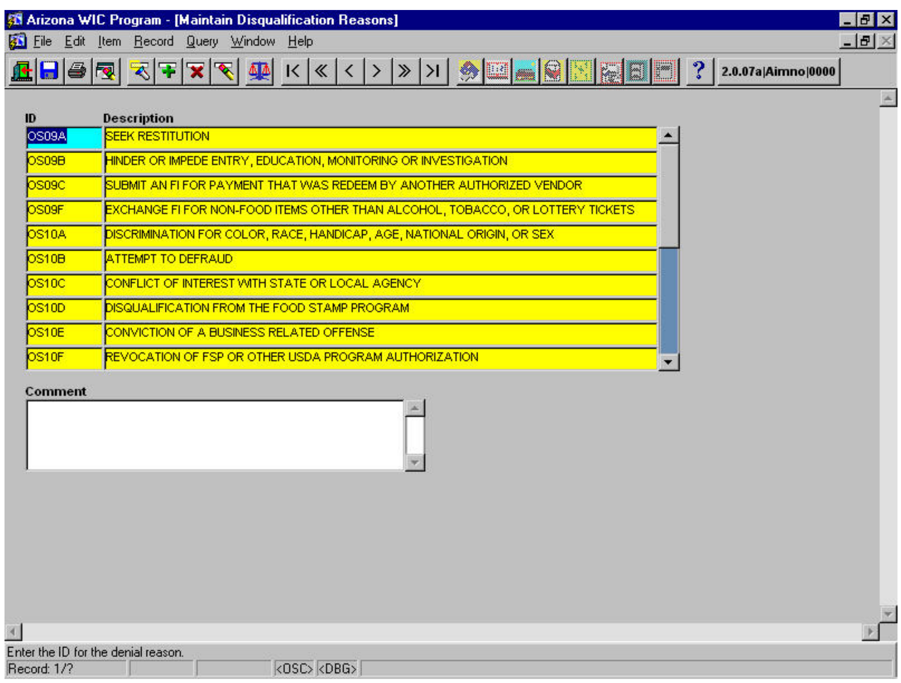


Figure 7 – Maintain Disqualification Reasons

Add a Disqualification Reason

1. The System defaults the cursor to highlight the ID number under the first entry in the ID field. The System also displays the Description and any existing Comments for that Disqualification Reason.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the ID and Description fields for you to add a new Disqualification Reason.
3. In the ID field, enter a number for the new Disqualification Reason to be added. If the ID you choose is already in use for another Disqualification Reason, the System displays a pop-up window indicating: "Row already exists with same ID." Click the OK button, delete the ID number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Disqualification Reason.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Disqualification Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Disqualification Reason being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Disqualification Reason.
7. Update the Disqualification Reason as needed. (*Note: The System will not allow updates to the ID itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Disqualification Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Disqualification Reason being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Disqualification Reason.
7. Verify that the information being displayed is for the Disqualification Reason to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Disqualification Reason.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 7 – Maintain Disqualification Reasons

Fields

ID - The user-defined identification for the disqualification reason. This field is mandatory.
Description - The description for the disqualification reasons. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain FSP Regional Offices

To Maintain FSP Regional Offices:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click FSP Regional Offices as shown below:

The FSP Regional Offices window is displayed:

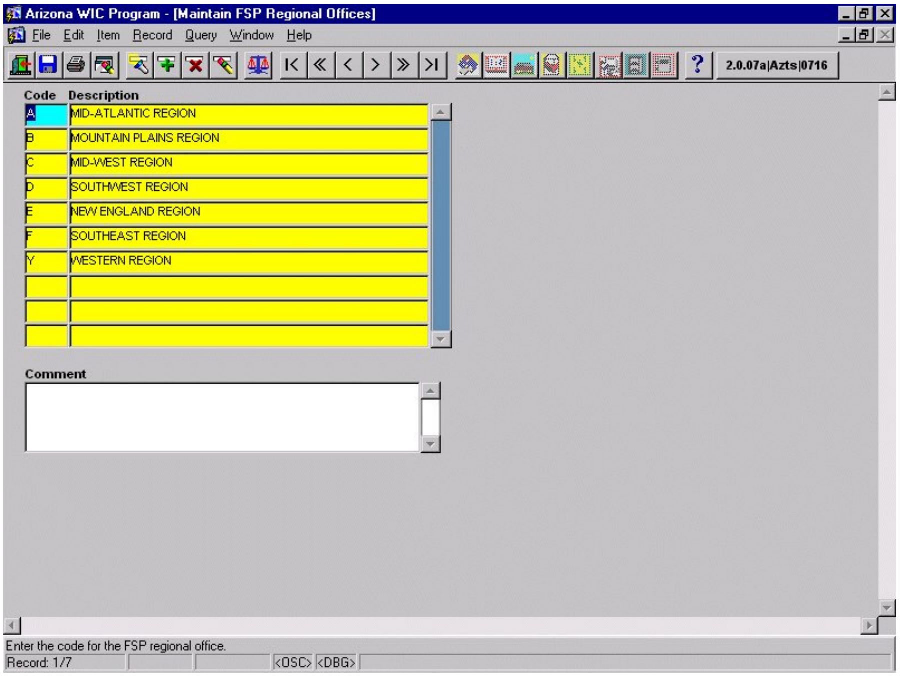


Figure 8 – Maintain FSP Regional Offices

Add a FSP Regional Office

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that FSP Regional Office.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new FSP Regional Office.
3. In the Code field, enter a number for the new FSP Regional Office to be added. If the code you choose is already in use for another FSP Regional Office, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new FSP Regional Office.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a FSP Regional Office

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the FSP Regional Office being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this FSP Regional Office.
7. Update the FSP Regional Office as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a FSP Regional Office

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the FSP Regional Office being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this FSP Regional Office.
7. Verify that the information being displayed is for the FSP Regional Office to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the FSP Regional Office.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 8 – Maintain FSP Regional Offices

Fields

Code - This field is a unique identifier for the FSP (Food Stamp Program) Regional Office. This field is

mandatory.
Description - This field is a description of the FSP Regional Office. This field is mandatory.
Comment - The user may provide comments or notes. This field is optional.

Maintain FSP Violations

To Maintain FSP Violations:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click FSP Violations as shown below:

The FSP Violations window is displayed:

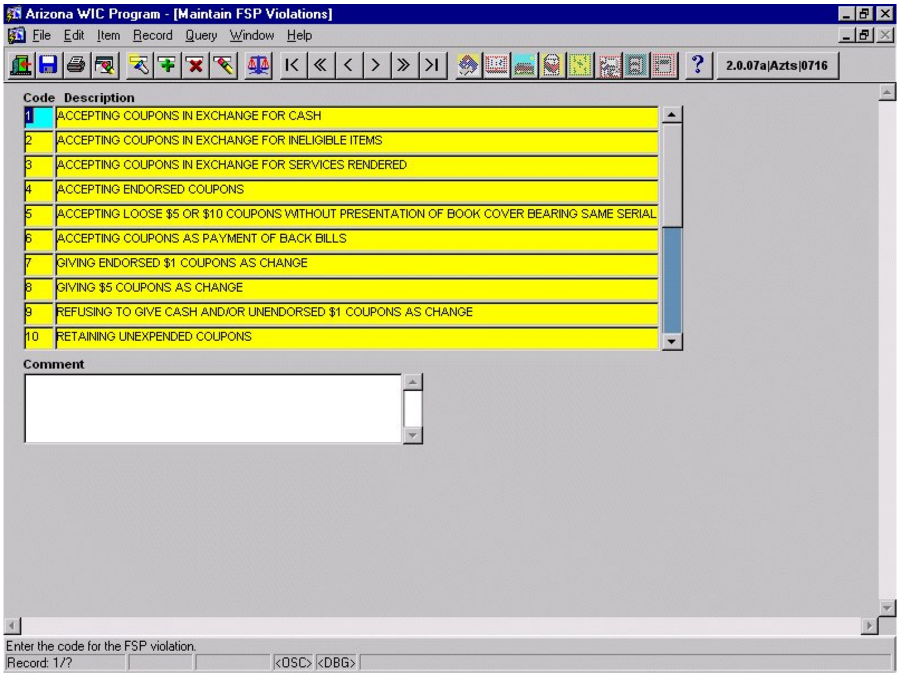


Figure 9 – Maintain FSP Violations

Add a FSP Violation

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that FSP Violation.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new FSP Violation.
3. In the Code field, enter a number for the new FSP Violation to be added. If the code you choose is already in use for another FSP Violation, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new FSP Violation.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a FSP Violation

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the FSP Violation being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this FSP Violation.
7. Update the FSP Violation as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a FSP Violation

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the FSP Violation being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this FSP Violation.
7. Verify that the information being displayed is for the FSP Violation to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the FSP Violation.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 9 – Maintain FSP Violations

Fields

Code - This field is a unique identifier for the FSP (Food Stamp Program) Violation Type. This field is mandatory.
Description - This field is a description for the unique identifier for the FSP Violation Type. This field is

mandatory.
Comment - The user may provide comments or notes. This field is optional.

Maintain Health Violation Types

To Maintain Health Violation Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Health Violation as shown below:

The Maintain Health Violation Types window is displayed:

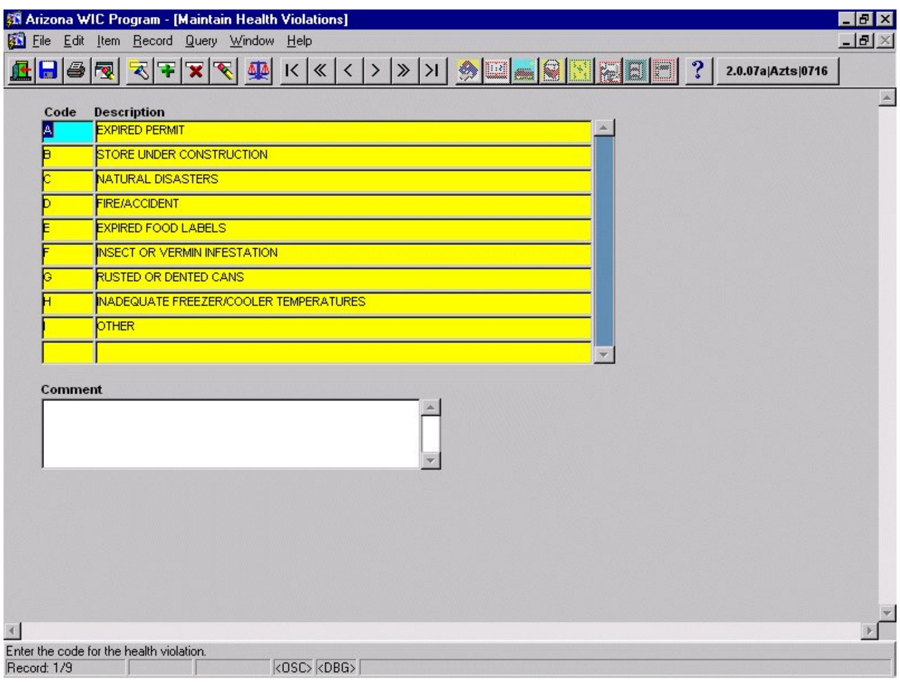


Figure 10 – Maintain Health Violation Types

Add Health Violation Type

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Health Violation Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Health Violation Type.
3. In the Code field, enter a number for the new Health Violation Type to be added. If the code you choose is already in use for another Health Violation Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Health Violation Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Health Violation Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Health Violation Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Health Violation Type.
7. Update the Health Violation Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Health Violation Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Health Violation Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Health Violation Type.
7. Verify that the information being displayed is for the Health Violation Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction complete."
10. Click the OK button to successfully delete the Health Violation Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 10 – Maintain Health Violation Types

Fields

Code - The unique identifier for the health violation type. This field is mandatory.
Description - The description of the unique identifier for the health violation. This field is mandatory.
Comment - The user may provide comments or notes. This field is optional.

Maintain Milestone Types

To Maintain Milestone Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Milestones as shown below:

The Maintain Milestone Types window is displayed:

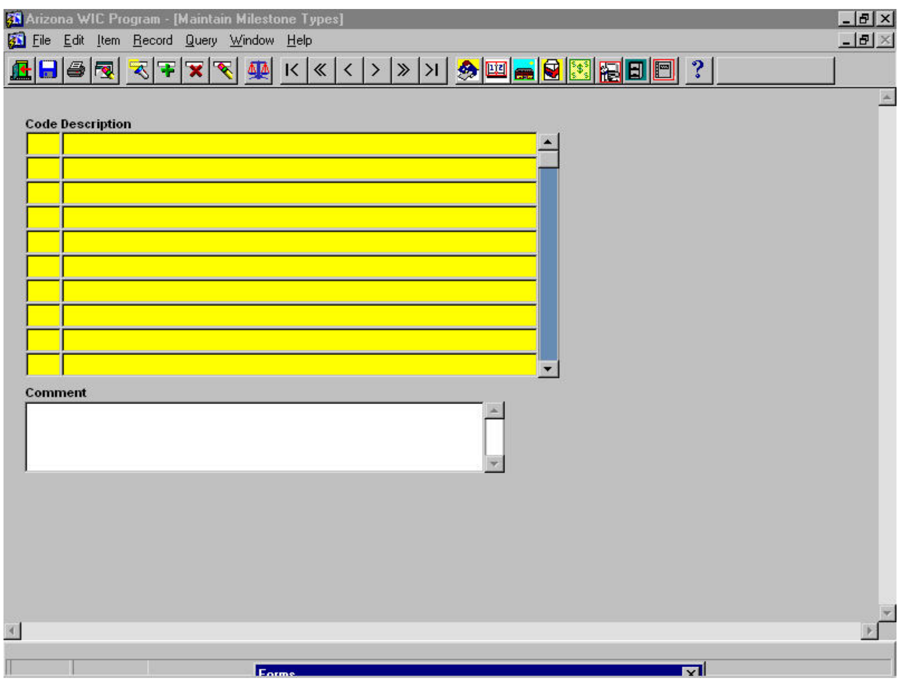


Figure 11 – Maintain Milestone Types

Add Milestone Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Milestone Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Milestone Type.
3. In the Code field, enter a number for the new Milestone Type to be added. If the code you choose is already in use for another Milestone Type, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Milestone Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Milestone Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Milestone Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Milestone Type.
7. Update the Milestone Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Milestone Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Milestone Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Milestone Type.
7. Verify that the information being displayed is for the Milestone Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Milestone Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 11 – Maintain Milestone Types

Fields

Code - The user-defined identification for the milestone types. This field is mandatory.
Description - The description for the milestone type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Owner Type

To Maintain Owner Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Owner Types as shown below:

The Maintain Owner Types window is displayed:

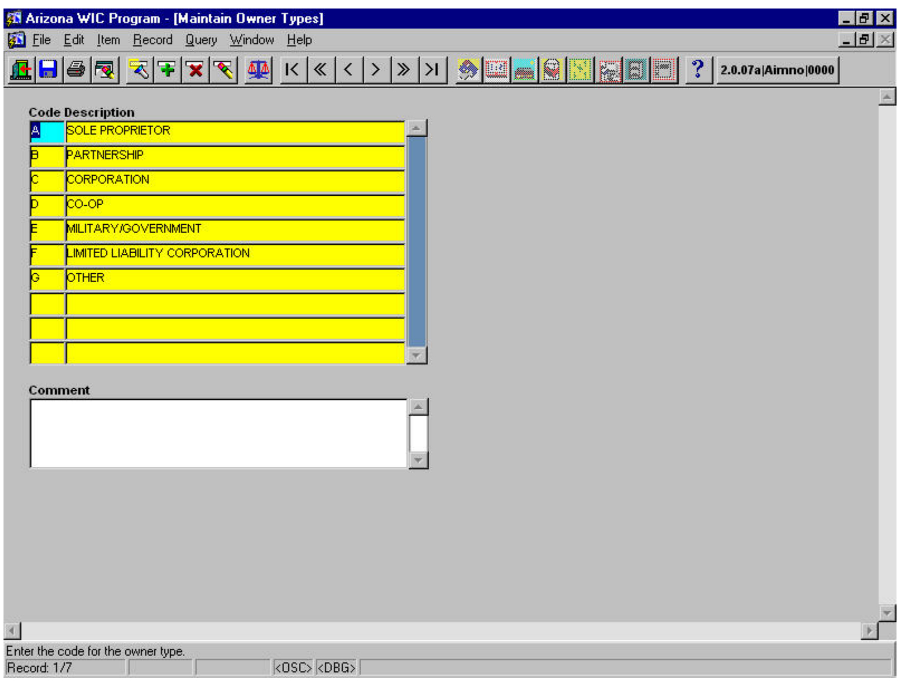


Figure 12 – Maintain Owner Type

Add Owner Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Owner Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Owner Type.
3. In the Code field, enter a number for the new Owner Type to be added. If the code you choose is already in use for another Owner Type, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Owner Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Owner Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Owner Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Owner Type.
7. Update the Owner Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Owner Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Owner Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Owner Type.
7. Verify that the information being displayed is for the Owner Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Owner Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 12 – Maintain Owner Type

Fields

Code - The user-defined identification code for the Owner type. This field is mandatory.

Description - The description for the Owner type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Peer Groups

To Maintain Peer Groups:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Peer Groups as shown below:

The Maintain Peer Groups window is displayed:

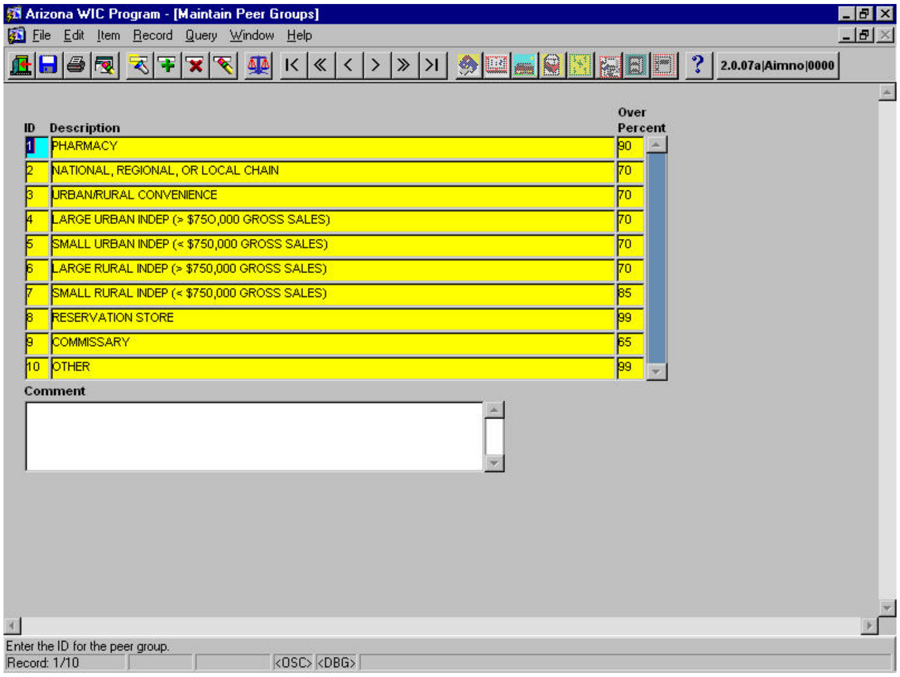


Figure 13 – Maintain Peer Groups

Add Peer Groups

1. The System defaults the cursor to highlight the ID number under the first entry in the ID field. The System also displays the Description and any existing Comments for that Peer Group.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the ID and Description fields for you to add a new Peer Group.
3. In the ID field, enter a number for the new Peer Group to be added. If the ID you choose is already in use for another Peer Group, the System displays a pop-up window indicating: "Row already exists with same ID." Click the OK button, delete the ID number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Peer Group.
5. Tab to the over percent field and enter the override percent for the peer group.
6. TAB to the Comment field and enter any applicable comments.
7. Click the Save icon.
8. The system displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Update a Peer Group

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Peer Group being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Peer Group.
7. Update the Peer Group as needed. (*Note: The System will not allow updates to the ID itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Peer Group

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Peer Group being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Peer Group.
7. Verify that the information being displayed is for the Peer Group to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Peer Group.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 13 – Maintain Peer Groups

Fields

ID - The user-defined identification for the peer group. This field is mandatory.
Description - The description for the peer groups. This field is mandatory.
Over Percent - The default override percent for the peer group. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Pilot Study Answers

To Maintain Pilot Study Answers:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Pilot Study Answers as shown below:

The Maintain Pilot Study Answers window is displayed:

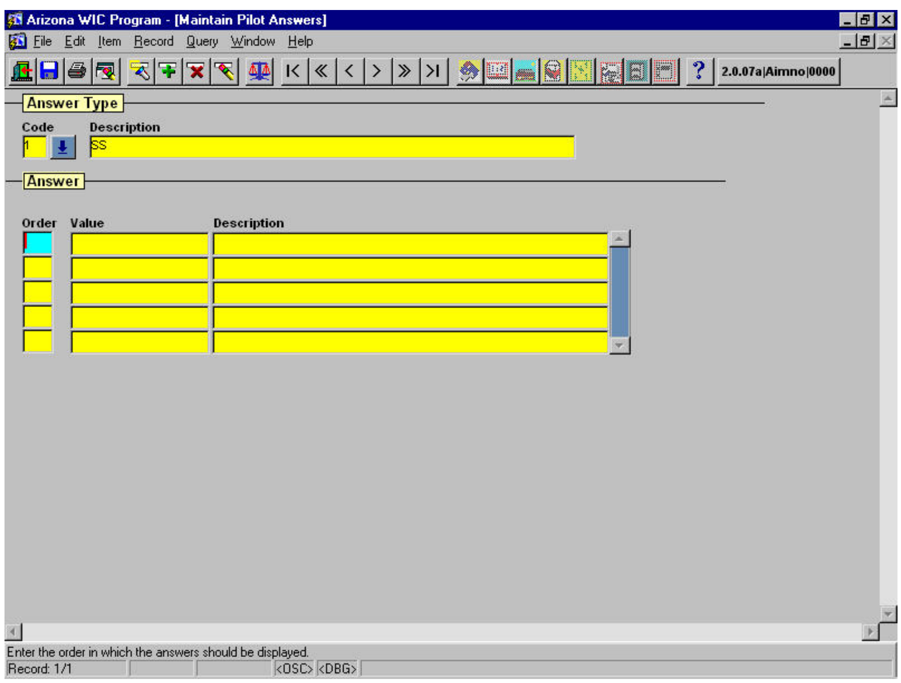


Figure 14 – Pilot Study Answers

Add Pilot Study Answers

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Pilot Study Answer.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Pilot Study Answer.
3. In the Code field, enter a number for the new Pilot Study Answer to be added. If the code you choose is already in use for another Pilot Study Answer, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Pilot Study Answer.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Pilot Study Answer

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Pilot Study Answer being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Pilot Study Answer.
7. Update the Pilot Study Answer as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Pilot Study Answer

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Pilot Study Answer being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Pilot Study Answer.
7. Verify that the information being displayed is for the Pilot Study Answer to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Pilot Study Answer.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 14 – Pilot Study Answers

Fields (Answer Type section)

Code - The Answer Type code. This field is mandatory, and existing Answer Types can be selected from

a list of values.
Description - The description of the Code. This field is display only.

Fields (Answer section)

Order - The order in which the answers for the Answer Type should be displayed. This field is mandatory.
Value - The Answer code value which is associated with the Answer Type. This field is mandatory.
Description - The description of the Value. This field is mandatory.

Maintain Pilot Study Questions

To Maintain Pilot Study Questions:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Pilot Study Questions as shown below:

The Maintain Pilot Study Questions window is displayed:

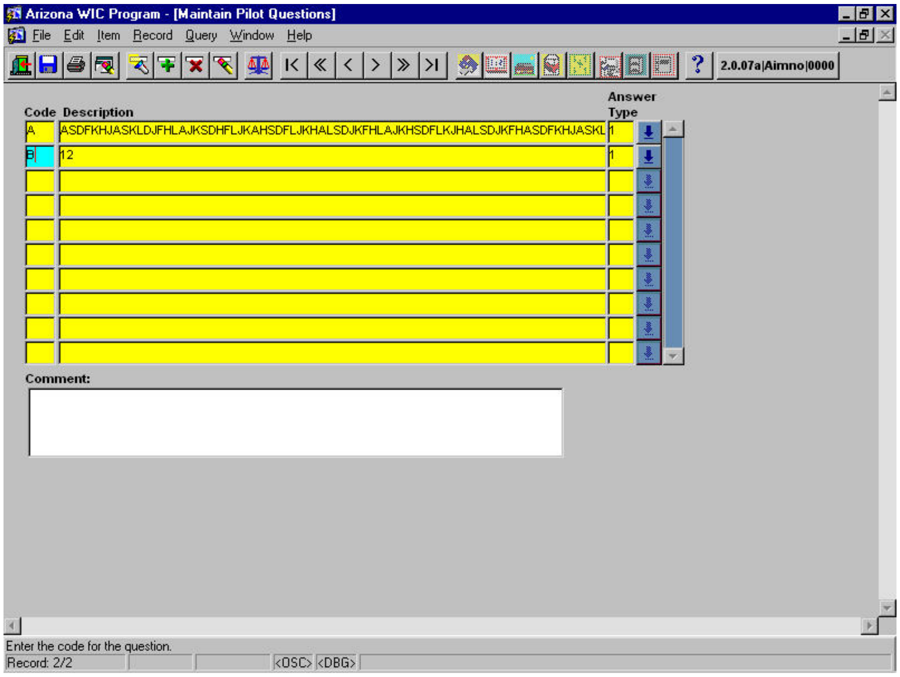


Figure 15 – Pilot Study Questions

Add Pilot Study Questions

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Pilot Study Question.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Pilot Study Question.
3. In the Code field, enter a number for the new Pilot Study Question to be added. If the code you choose is already in use for another Pilot Study Question, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Pilot Study Question.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Pilot Study Question

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Pilot Study Question being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Pilot Study Question.
7. Update the Pilot Study Question as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Pilot Study Question

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Pilot Study Question being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Pilot Study Question.
7. Verify that the information being displayed is for the Pilot Study Question to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Pilot Study Question.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 15 – Pilot Study Questions

Fields

Code - The code that identifies the question. This field is mandatory.

Question Text - The text of the question. This field is mandatory.
Answer Type - The Answer Type of the answers that can be used with this question. This field is mandatory and can be selected from a list of values. For more information, please refer to the Pilot Answers table.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Risk Factors

To Maintain Risk Factors:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Risk Factors as shown below:

The Maintain Risk Factors window is displayed:

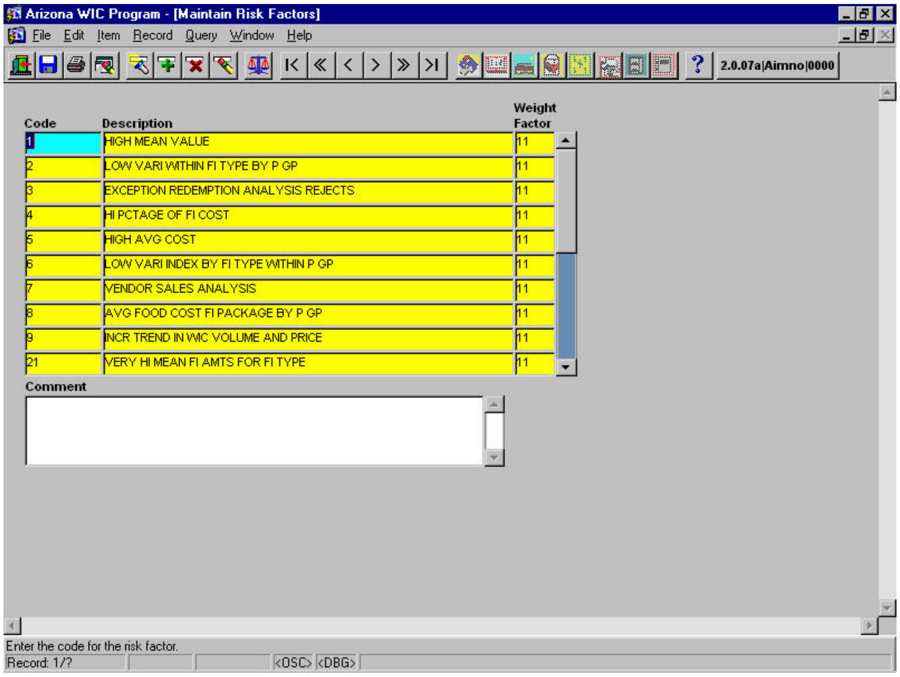


Figure 16 – Maintain Risk Factors

Add Risk Factors

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Risk Factor.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Risk Factor.
3. In the Code field, enter a number for the new Risk Factor to be added. If the code you choose is already in use for another Risk Factor, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Risk Factor.
5. TAB to the weight factor field and enter the appropriate number.
6. TAB to the Comment field and enter any applicable comments.
7. Click the Save icon.
8. The system displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Update a Risk Factor

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Risk Factor being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Risk Factor.
7. Update the Risk Factor as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Risk Factor

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Risk Factor being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Risk Factor.
7. Verify that the information being displayed is for the Risk Factor to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Risk Factor.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 16 – Maintain Risk Factors

Fields

Code - The identifying code for the risk factor. This field is mandatory.
Description - The description of the risk factor. This field is mandatory.
Weight Factor - A weight applied to the risk factor for the purpose of priority. This field is mandatory.
Comment - The comments applied to each risk factor entered. This field is optional.

Maintain Risk Level

To Maintain Risk Levels:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Risk Levels as shown below:

The Maintain Risk Levels window is displayed:

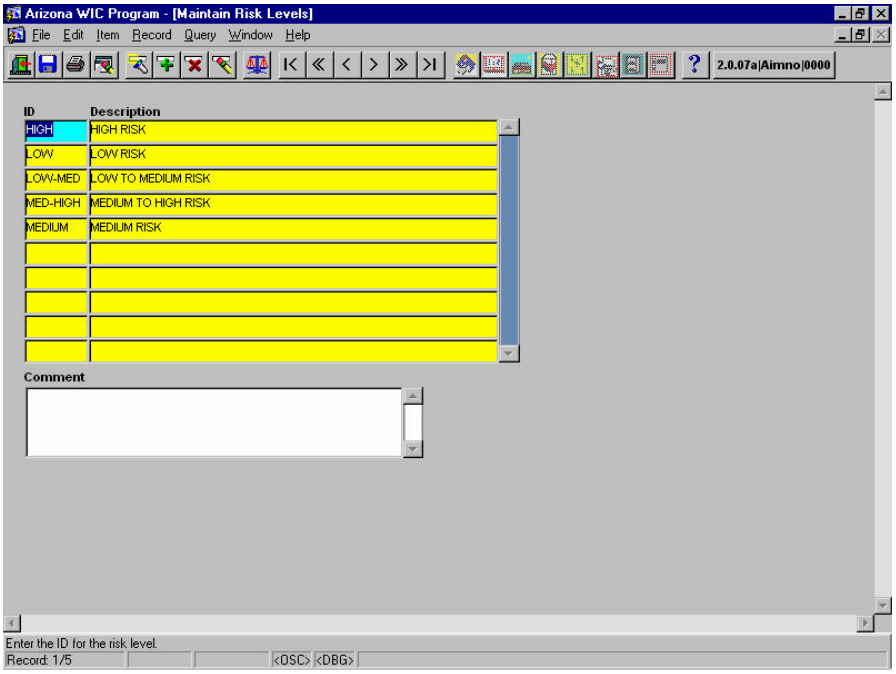


Figure 17 – Maintain Risk Levels

Add Risk Levels

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Risk Level.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Risk Level.
3. In the Code field, enter a number for the new Risk Level to be added. If the code you choose is already in use for another Risk Level, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Risk Level.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Risk Level

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Risk Level being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Risk Level.
7. Update the Risk Level as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Risk Level

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Risk Level being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Risk Level.
7. Verify that the information being displayed is for the Risk Level to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Risk Level.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 17 – Maintain Risk Levels

Fields

ID - The user-defined identification for the risk level. This field is mandatory.
Description - The description for the risk level. This field is mandatory.

Comment - The user may provide any comments or remarks. This field is optional.

Maintain Status

To Maintain Status:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Statuses as shown below:

The Maintain Status window is displayed:

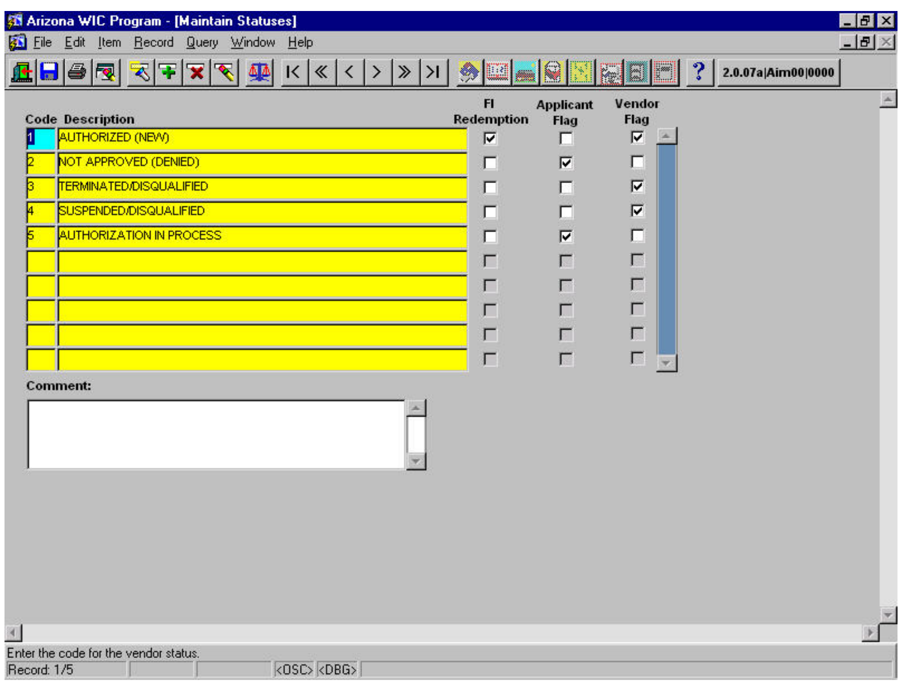


Figure 18 – Maintain Statuses

Add Status

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Status.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Status.
3. In the Code field, enter a number for the new Status to be added. If the code you choose is already in use for another Status, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Status.
5. TAB to the checkboxes and check the appropriate ones.
6. TAB to the Comment field and enter any applicable comments.
7. Click the Save icon.
8. The system displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Update a Status

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Status being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Status.
7. Update the Status as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Status

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Status being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Status.
7. Verify that the information being displayed is for the Status to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Status.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

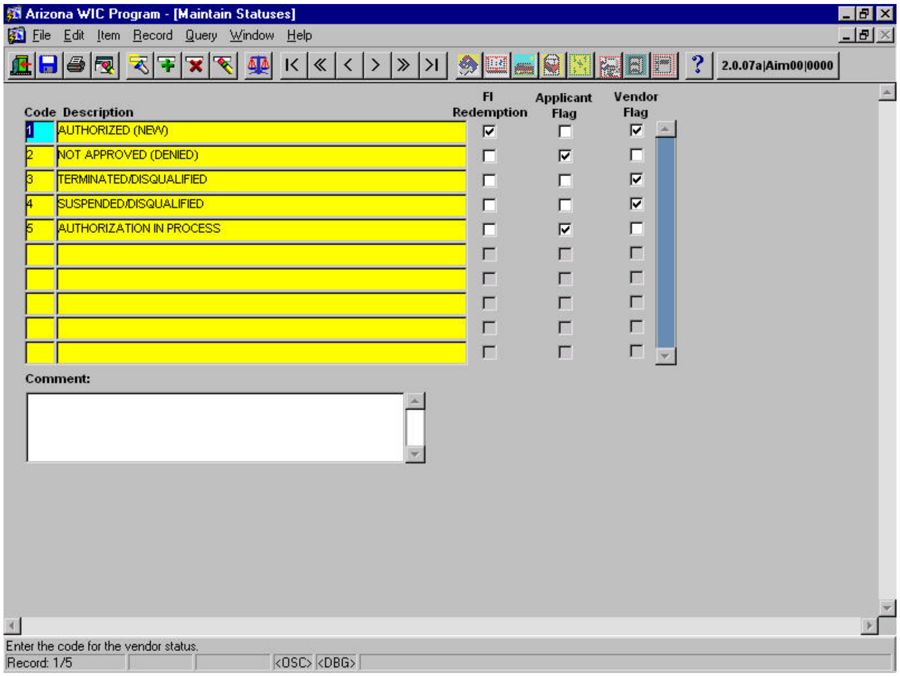


Figure 18 – Maintain Statuses

Fields

Code - The user-defined identification code for the Vendor/Applicant status. This field is mandatory.
Description - The description of Vendor/Applicant status. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

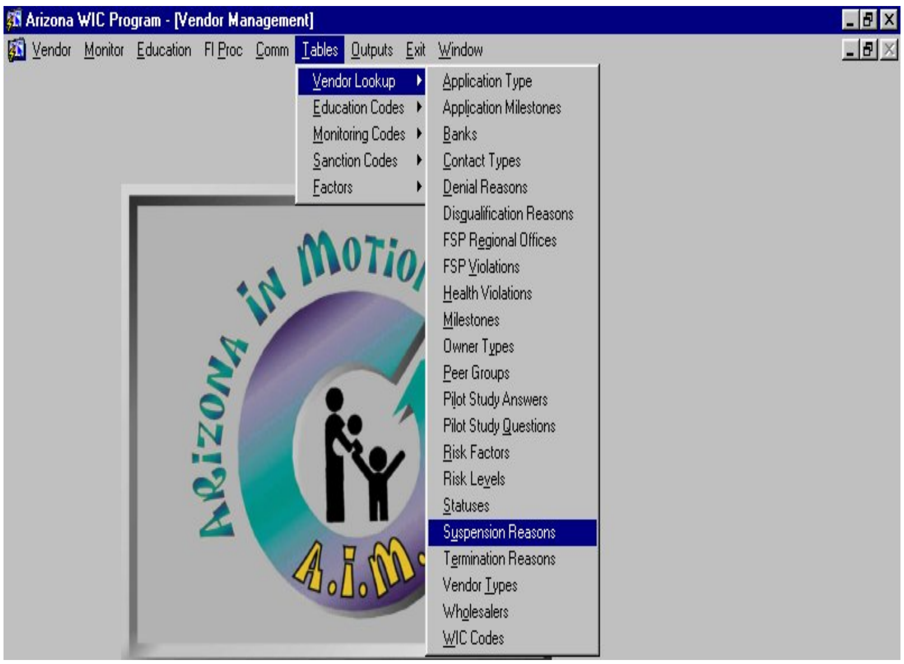
Checkboxes

FI Redemption - A check box that indicates a Vendor with this status can accept FI's. This check box cannot be marked unless the Vendor Flag is marked.
Applicant Flag - A check box that indicates an Applicant with this status is applying for WIC authorization. This check box cannot be marked if either the FI Redemption or Vendor Flag are marked.
Vendor Flag - A check box that indicates a Vendor with this status has been authorized for WIC. This check box cannot be marked if the Applicant Flag is marked. This check box must be marked if the FI Redemption is marked.

Maintain Suspension Reason

To Maintain Suspension Reasons:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Suspension Reasons as shown below:



The Maintain Suspension Reasons window is displayed:

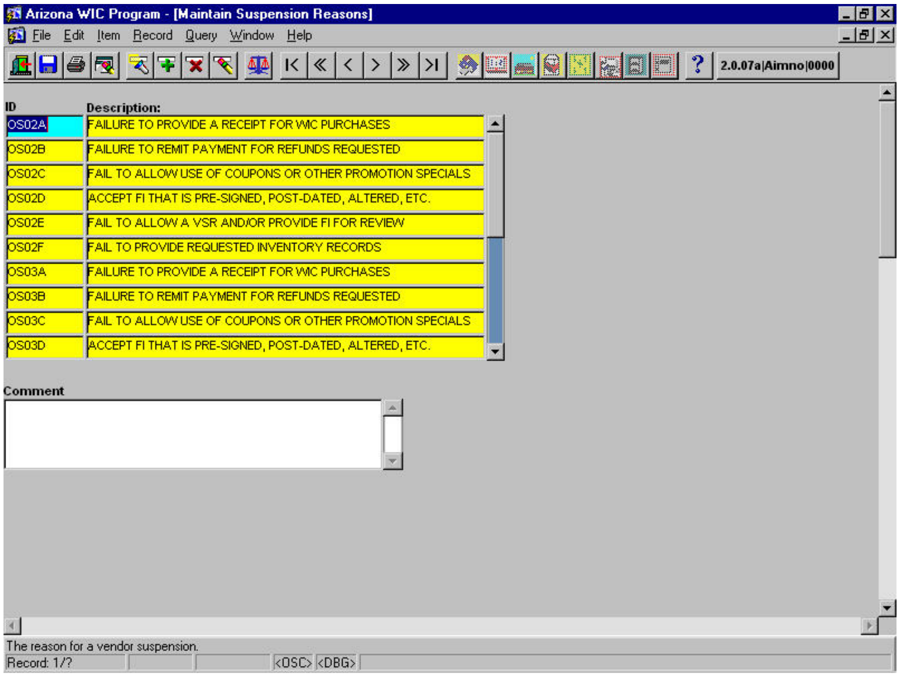


Figure 19 – Maintain Suspension Reason

Add Suspension Reasons

1. The System defaults the cursor to highlight the ID number under the first entry in the ID field. The System also displays the Description and any existing Comments for that Suspension Reason.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the ID and Description fields for you to add a new Suspension Reason.
3. In the ID field, enter a number for the new Suspension Reason to be added. If the ID you choose is already in use for another Suspension Reason, the System displays a pop-up window indicating: “Row already exists with same ID.” Click the OK button, delete the ID number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Suspension Reason.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Suspension Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Suspension Reason being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Suspension Reason.
7. Update the Suspension Reason as needed. (*Note: The System will not allow updates to the ID itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Suspension Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Suspension Reason being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Suspension Reason.
7. Verify that the information being displayed is for the Suspension Reason to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Suspension Reason.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

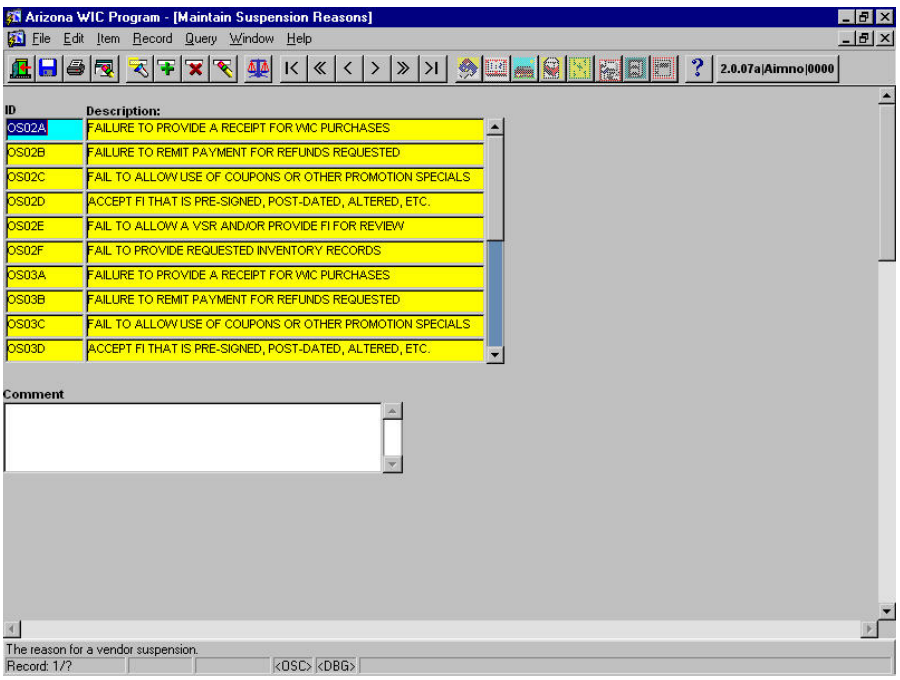


Figure 19 – Maintain Suspension Reason

Fields

ID - The user-defined identification for the suspension reason. This field is mandatory.
Description - The description for the suspension reasons. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Termination Reasons

To Maintain Termination Reasons:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Termination Reasons as shown below:

The Maintain Termination Reasons window is displayed:

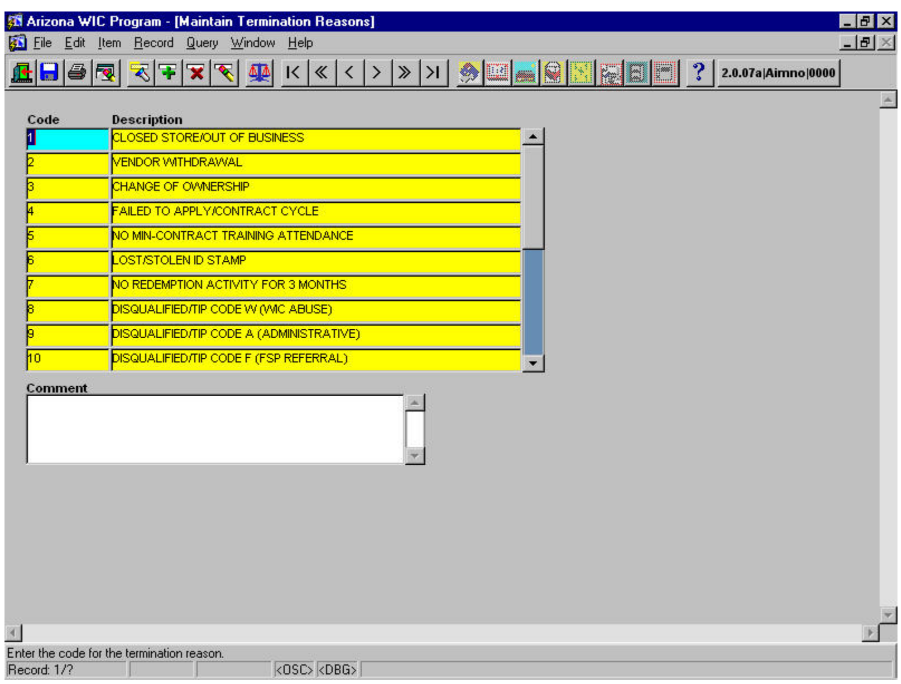


Figure 20 – Maintain Termination Reasons

Add Termination Reasons

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Termination Reason.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Termination Reason.
3. In the Code field, enter a number for the new Termination Reason to be added. If the code you choose is already in use for another Termination Reason, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Termination Reason.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Termination Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Termination Reason being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Termination Reason.
7. Update the Termination Reason as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Termination Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Termination Reason being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Termination Reason.
7. Verify that the information being displayed is for the Termination Reason to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Termination Reason.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

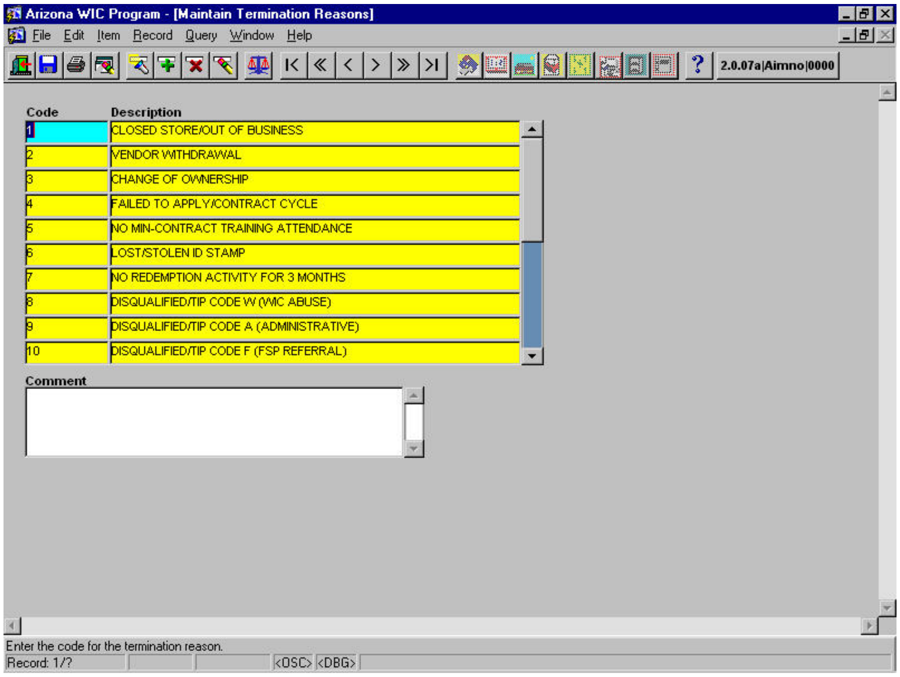


Figure 20 – Maintain Termination Reasons

Fields

Code - The user-defined identification for the Vendor termination reason. This field is mandatory.
Description - The description for the Vendor termination reason. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Vendor/Applicant Type

To Maintain Vendor/Applicant Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Vendor Types as shown below below:

The Maintain Vendor Types window is displayed:

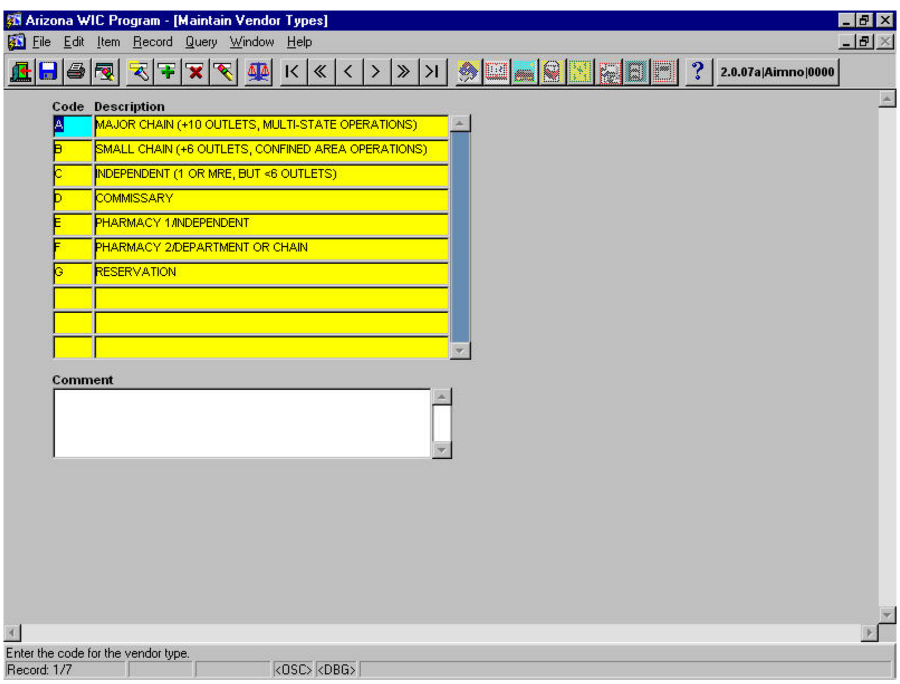


Figure 21 – Maintain Vendor Types

Add Vendor Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Vendor/Applicant Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Vendor/Applicant Type.
3. In the Code field, enter a number for the new Vendor/Applicant Type to be added. If the code you choose is already in use for another Vendor/Applicant Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Vendor/Applicant Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Vendor Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Vendor/Applicant Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Vendor/Applicant Type.
7. Update the Vendor/Applicant Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Vendor Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Vendor/Applicant Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Vendor/Applicant Type.
7. Verify that the information being displayed is for the Vendor/Applicant Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Vendor/Applicant Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 21 – Maintain Vendor Types

Fields

Code - The user-defined identification code for the Vendor/Applicant type. This field is mandatory.
Description - The description for the Vendor/Applicant type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Wholesalers

To Maintain Wholesalers:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click Wholesalers as shown below below:

The Maintain Wholesalers window is displayed:

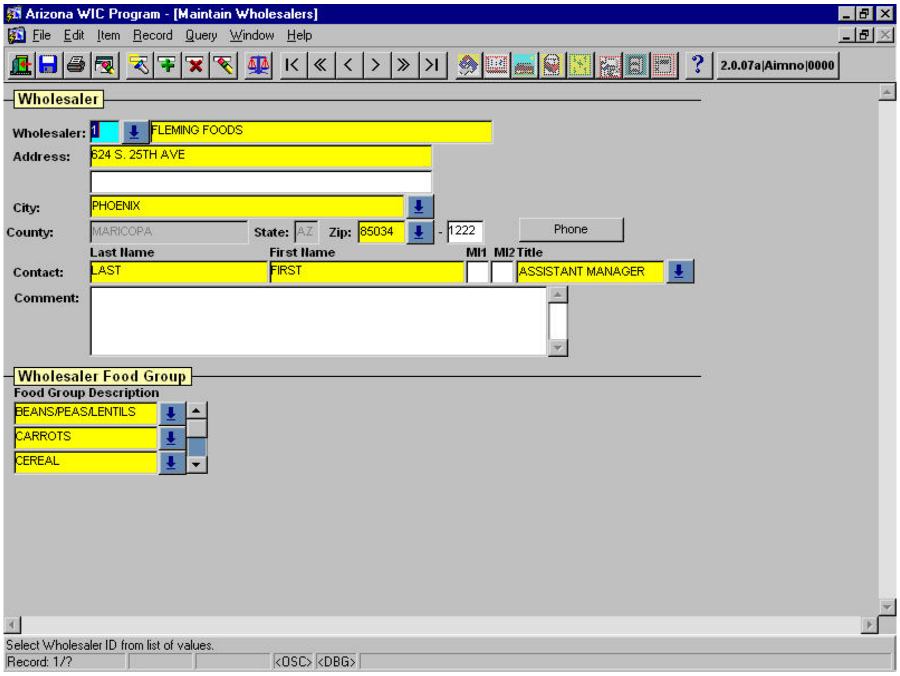


Figure 22 – Maintain Wholesalers

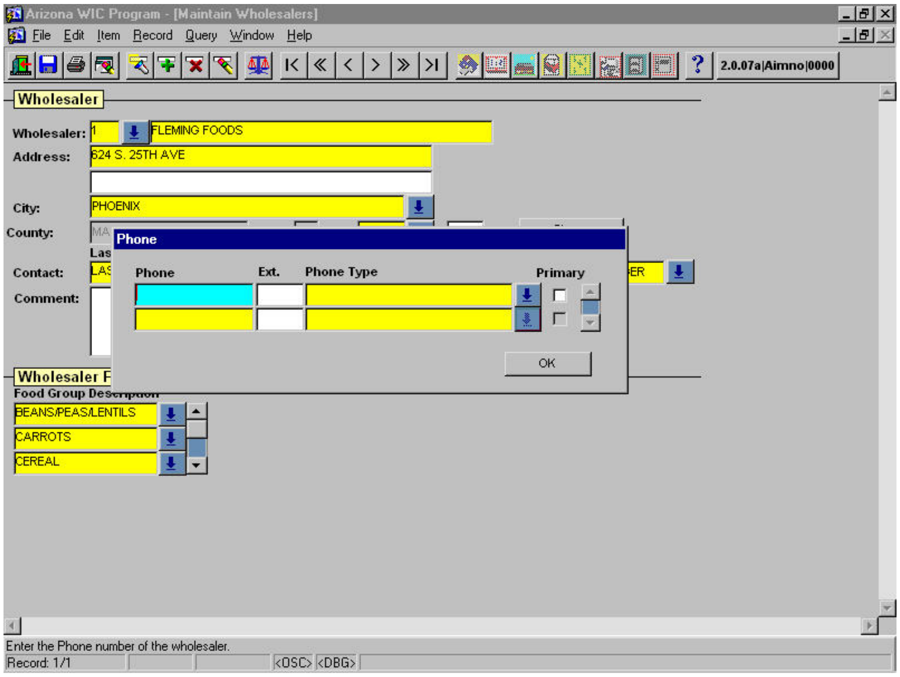


Figure 23 – Maintain Wholesaler Telephone (s)

Add Wholesalers

1. The System defaults the cursor to highlight the code number under the first entry in the Wholesaler field. The System also displays the Name and any existing Comments for that Wholesaler.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Name fields for you to add a new Wholesaler.
3. In the Wholesaler field, enter a number for the new Wholesaler to be added. If the code you choose is already in use for another Wholesaler, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Name field and enter the Name of the new Wholesaler.
5. TAB to Address, City, County, State, and Zip fields and enter the Address of the new wholesaler.
6. TAB to phone pop-up and fill in the appropriate information.
7. Click OK and return to the Maintain Wholesalers window.
8. TAB to the Comment field and enter any applicable comments.
9. TAB to the Field Group description field and select appropriate description from the list of values.
10. Click the Save icon.
11. The system displays a pop-up window indicating: "Transaction completed."
12. Click the OK button.

Update a Wholesaler

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Name of the Wholesaler being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Wholesaler.
7. Update the Wholesaler as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Wholesaler

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Name of the Wholesaler being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Wholesaler.
7. Verify that the information being displayed is for the Wholesaler to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Wholesaler.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 22 – Maintain Wholesalers

Fields (Wholesaler section)

Wholesaler - The name of the wholesalers. This field is mandatory and can be selected from a list of values. This field is mandatory
Address - The street address of the Wholesaler. The first line is mandatory, and the second line is optional.
City - The city in which wholesaler is located. This field is mandatory and can be selected from a list of values. Selection of a city will also fill in the state and county information. For more information, please refer to the Locales table in Systems Administration.
County - The county in which the wholesaler is located. This field is display only. It will be filled in when a city or zip is selected.
State - The state in which the wholesaler is located. This field is display only. It will be filled in when a city or zip is selected.
Zip - The wholesaler's zip code. This field is mandatory and can be selected from a list of values. Selection of a zip will also fill in the state and city information. For more information, please refer to the Locales table in Systems Administration.
Last Name - The last name of the person functioning as the Wholesaler's contact. This field is mandatory.
First Name - The first name of the person functioning as the Wholesaler's contact. This field is mandatory.

MI1 - The middle initial of the person functioning as the Wholesaler's contact. This field is optional.
MI2 - The second middle initial of the person functioning as the Wholesaler's contact. This field is optional.
Title - The Title description for the person functioning as the Wholesaler's contact. This field is mandatory and can be selected from a list of values. For more information, please refer to the Contact Type table.
Comment - Comments are entered here. This field is optional.

Fields (Wholesaler Food Group section)

Food Group Description - The description of the food group. This field is optional and can be selected from the list of values.

Push Button(s)

Phone - Brings up the Wholesaler's Phone window.

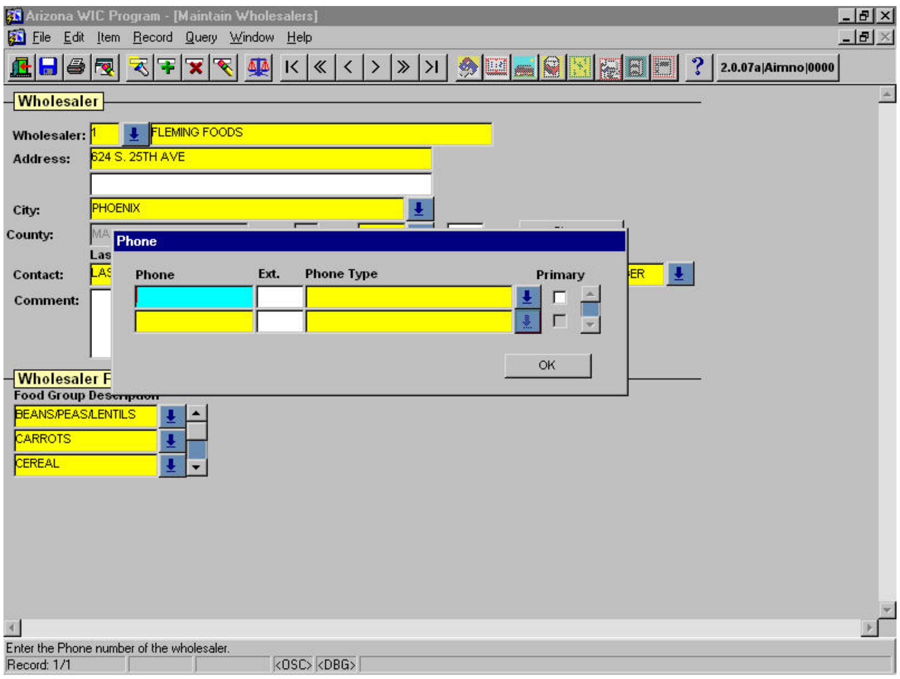


Figure 23 – Maintain Wholesaler Telephone (s)

Fields

Phone - The phone number of the Wholesaler. One phone number is required for the Wholesaler; otherwise this field is optional.
Ext. - The extension of the Wholesaler. This field is optional.
Phone Type - The type of phone/telecommunications device. This field is mandatory if Phone is filled in. This field can be chosen from a list of values. For more information, please refer to the Phone Type table in Systems Administration.

Push Button(s)

OK - Closes the window, returning the user to the previous screen or window.

Maintain WIC Codes

To Maintain WIC Codes:

1. Click Tables on the Vendor Management main menu.
2. Click on Vendor Look-up.
3. Click WIC Codes as shown below:

The Maintain WIC Codes window is displayed:

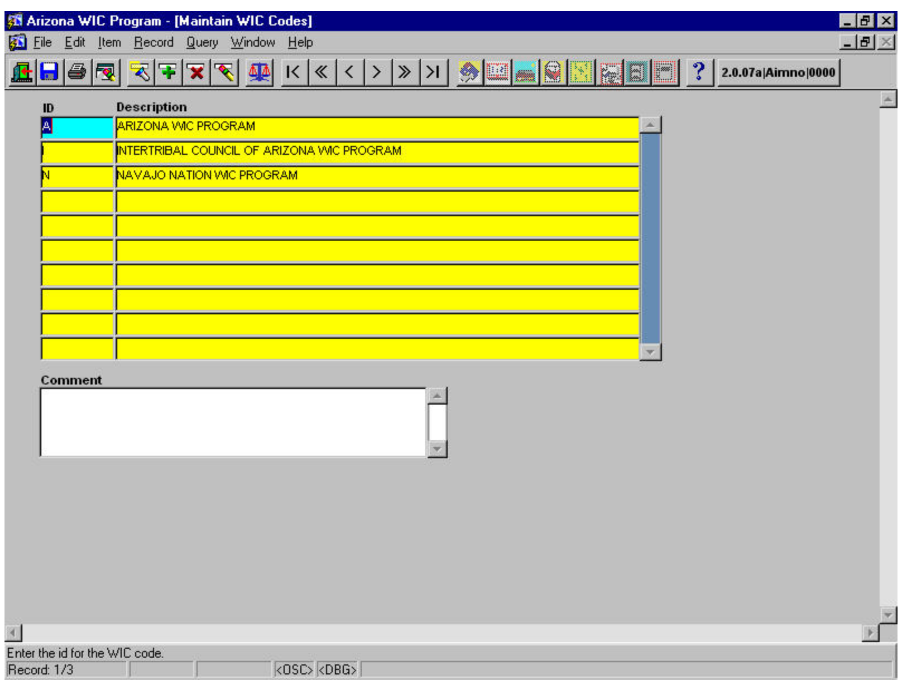


Figure 24 – Maintain WIC Codes

Add WIC Codes

1. The System defaults the cursor to highlight the ID number under the first entry in the ID field. The System also displays the Description and any existing Comments for that WIC ID.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the ID and Description fields for you to add a new WIC ID.
3. In the ID field, enter a number for the new WIC ID to be added. If the ID you choose is already in use for another WIC ID, the System displays a pop-up window indicating: "Row already exists with same ID." Click the OK button, delete the ID number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new WIC ID.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a WIC Code

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the WIC Code being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this WIC Code.
7. Update the WIC Code as needed. (*Note: The System will not allow updates to the ID itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a WIC Code

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the WIC Code being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this WIC Code.
7. Verify that the information being displayed is for the WIC Code to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the WIC Code.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 24 – Maintain WIC Codes

Fields

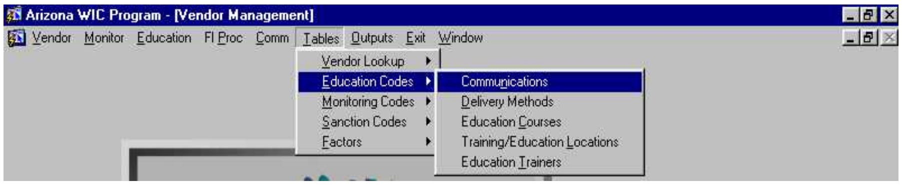
ID - The user-defined identification for the WIC Codes. This field is mandatory.

Description - The description for the WIC Codes. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Communications

To Maintain Communications:

1. Click Tables on the Vendor Management main menu.
2. Click on Education Codes.
3. Click Communications as shown below:



The Maintain Communications window is displayed:

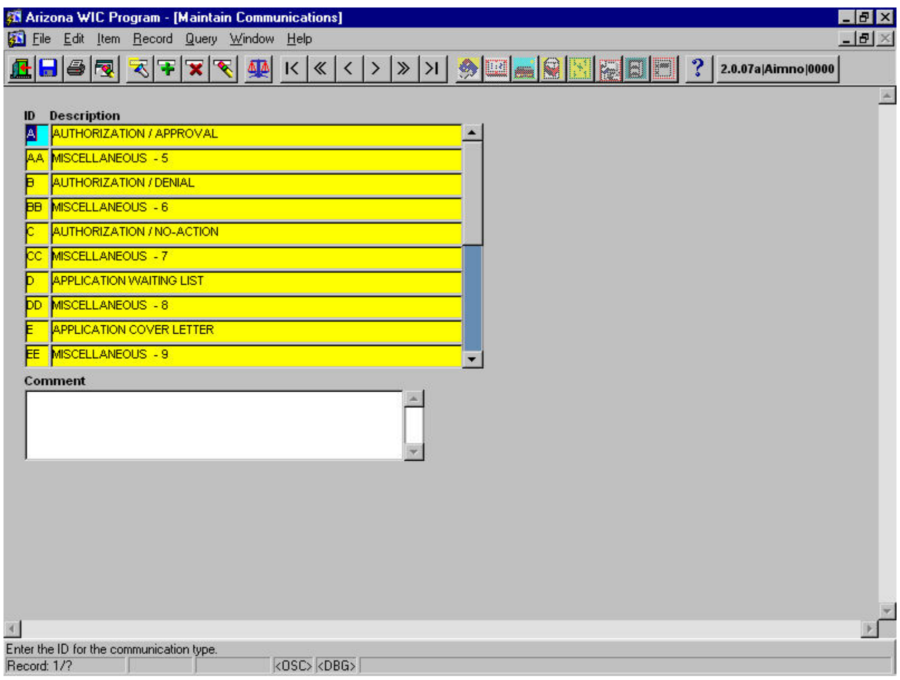


Figure 25 – Maintain Communications

Add Communications

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Communication.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Communication.
3. In the Code field, enter a number for the new Communication to be added. If the code you choose is already in use for another Communication, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a

different number.

4. TAB to the Description field and enter the description of the new Communication.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Communication

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Communication being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Communication.
7. Update the Communication as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Communication

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Communication being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Communication.
7. Verify that the information being displayed is for the Communication to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Communication.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

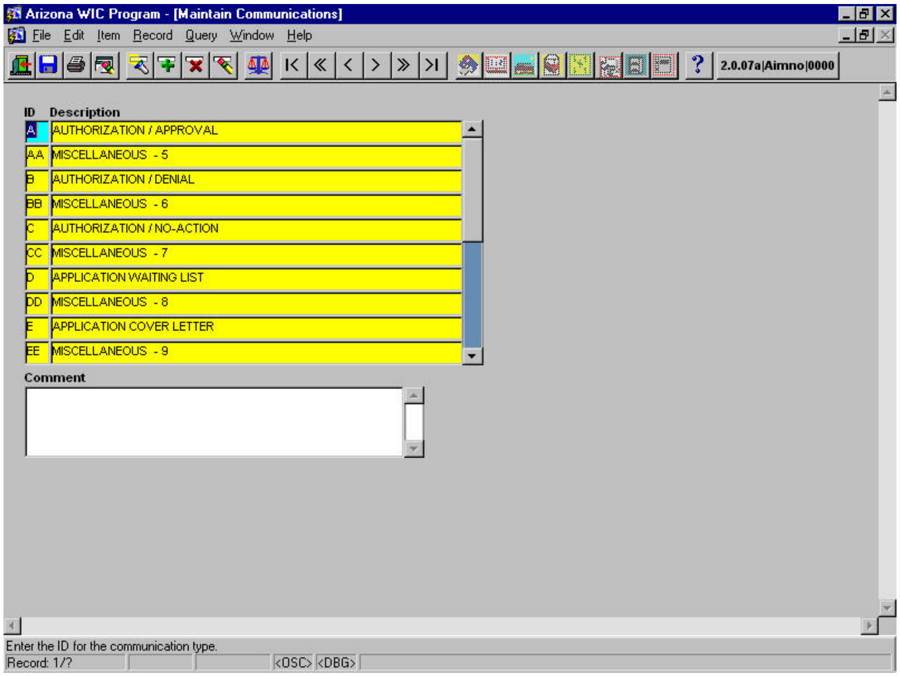


Figure 25 – Maintain Communications

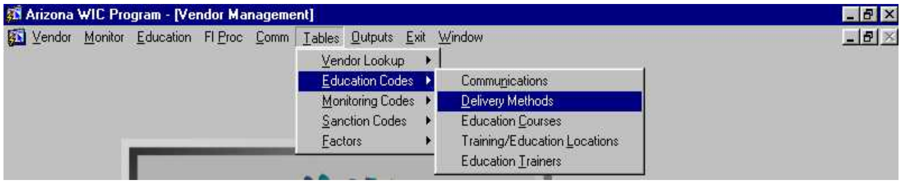
Fields

ID - The unique identifier for the Communication. This field is mandatory.
Description - The description of the unique identifier for the Communication. This field is mandatory.
Comment - The user may provide comments or notes. This field is optional.

Maintain Delivery Method

To Maintain Delivery Methods:

1. Click Tables on the Vendor Management main menu.
2. Click on Education Codes.
3. Click Delivery Methods as shown below:



The Maintain Delivery Methods window is displayed:

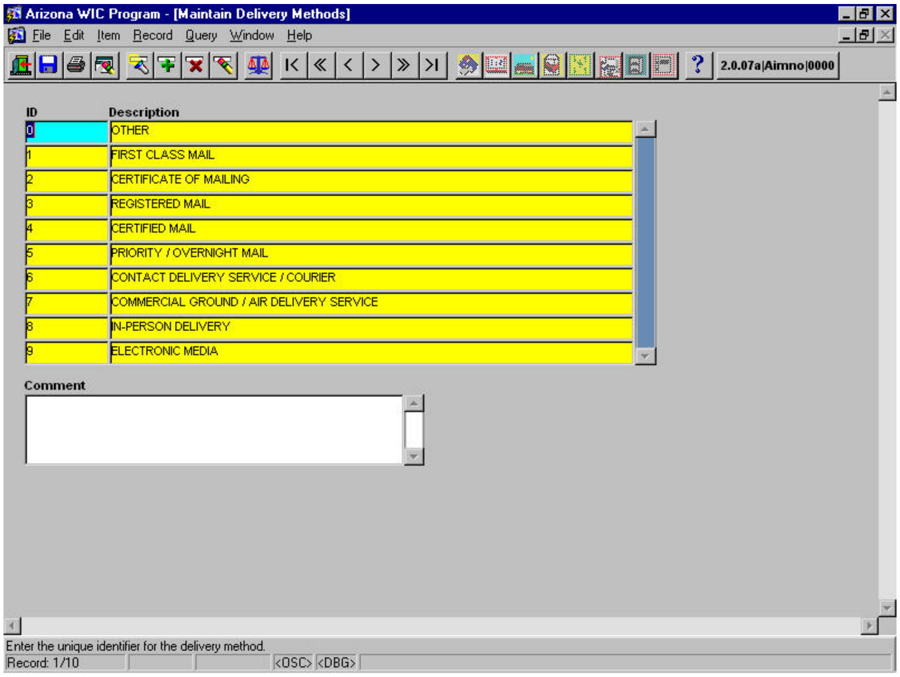


Figure 26 – Maintain Delivery Methods

Add Delivery Methods

1. The System defaults the cursor to highlight the ID number under the first entry in the ID field. The System also displays the Description and any existing Comments for that Delivery Method.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the ID and Description fields for you to add a new Delivery Method.
3. In the ID field, enter a number for the new Delivery Method to be added. If the ID you choose is already in use for another Delivery Method, the System displays a pop-up window indicating: “Row already exists with same ID.” Click the OK button, delete the ID number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Delivery Method.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Delivery Method

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Delivery Method being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Delivery Method.
7. Update the Delivery Method as needed. (*Note: The System will not allow updates to the ID itself. If attempted, the system will indicate: “Field is protected against update”).*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Delivery Method

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Delivery Method being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Delivery Method.
7. Verify that the information being displayed is for the Delivery Method to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed”.
10. Click the OK button to successfully delete the Delivery Method.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

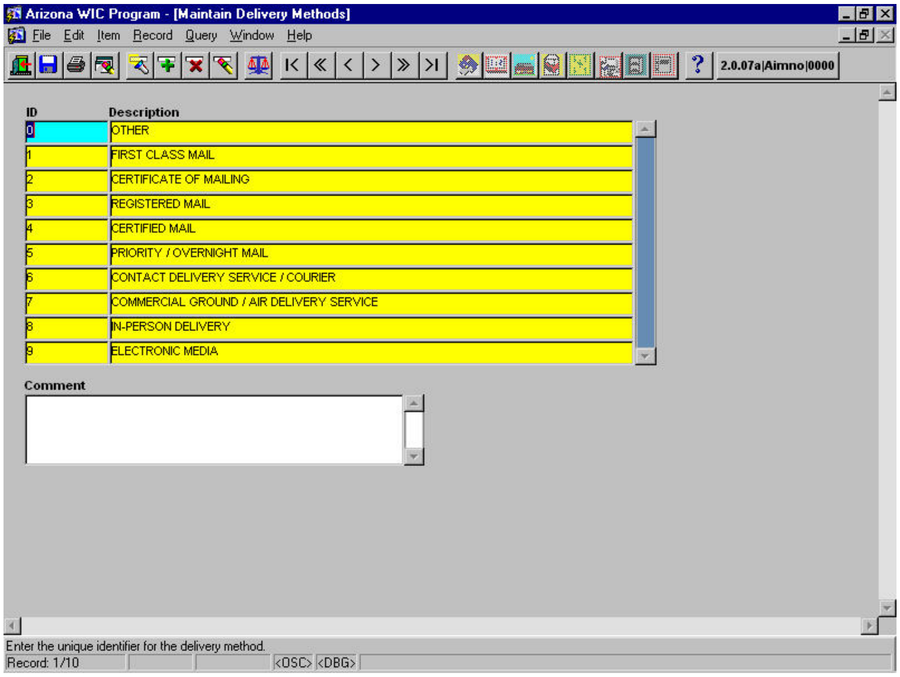


Figure 26 – Maintain Delivery Methods

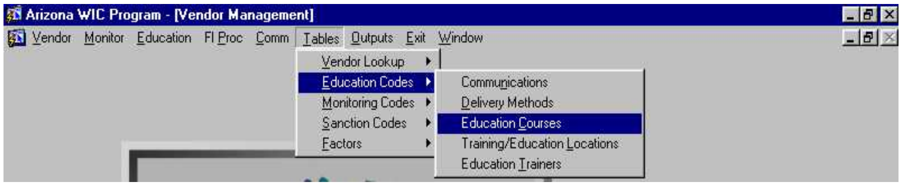
Fields

ID - The unique identifier for the delivery method. This field is mandatory.
Description - The description of the unique identifier for the delivery method. This field is mandatory.
Comment - The user may provide comments or notes. This field is optional.

Maintain Education Courses

To Maintain Education Courses:

1. Click Tables on the Vendor Management main menu.
2. Click on Education Codes.
3. Click Education Courses as shown below:



The Maintain Education Courses window is displayed:

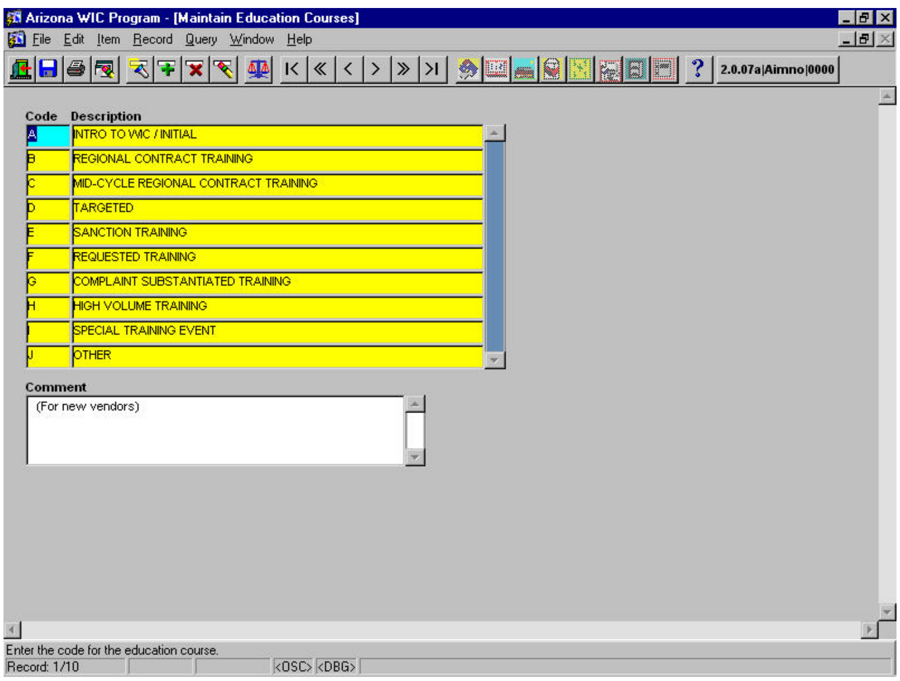


Figure 27 – Maintain Education Courses

Add Education Courses

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Education Course.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Education Course.
3. In the Code field, enter a number for the new Education Course to be added. If the code you choose is already in use for another Education Course, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Education Course.

5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Education Course

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Education Course being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Education Course.
7. Update the Education Course as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Education Course

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Education Course being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Education Course.
7. Verify that the information being displayed is for the Education Course to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Education Course.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 27 – Maintain Education Courses

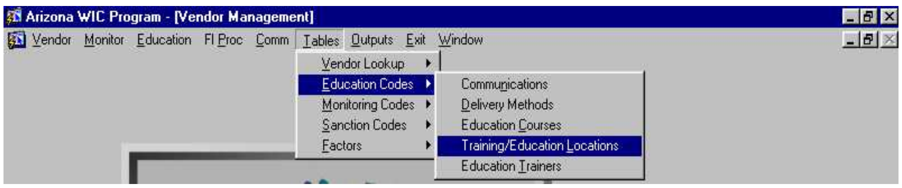
Fields

Code - The user-defined identification code for the education course. This field is mandatory.
Description - The description for the education course. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Education Location

To Maintain Training/Education Locations:

1. Click Tables on the Vendor Management main menu.
2. Click on Education Codes.
3. Click Training/Education Locations as shown below:



The Maintain Training/Education Locations window is displayed:

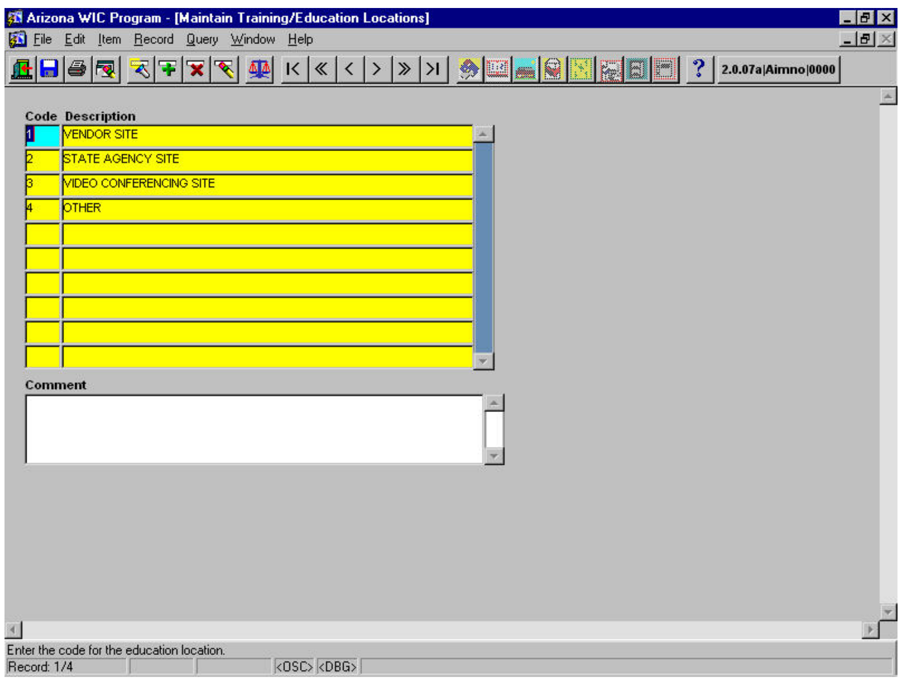


Figure 28 – Maintain Training/Education Locations

Add Training/Education Locations

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Training/Education Location.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Training/Education Location.
3. In the Code field, enter a number for the new Training/Education Location to be added. If the code

you choose is already in use for another Training/Education Location, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Training/Education Location.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Training/Education Location

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Training/Education Location being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Training/Education Location.
7. Update the Training/Education Location as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Training/Education Location

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Training/Education Location being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Training/Education Location.
7. Verify that the information being displayed is for the Training/Education Location to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Training/Education Location.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

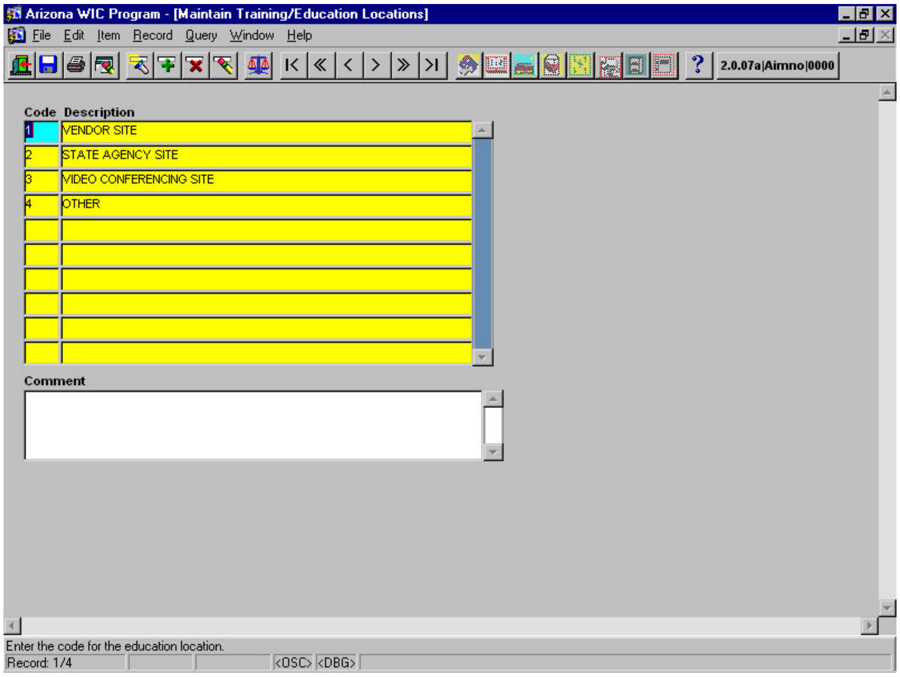


Figure 28 – Maintain Training/Education Locations

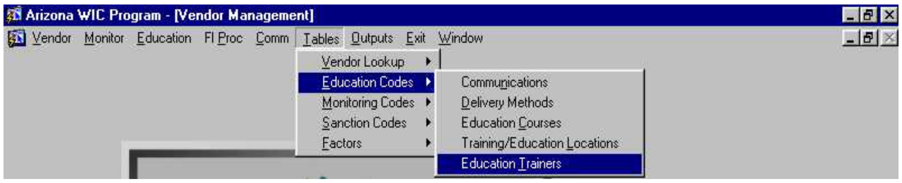
Fields

Code - The education location code. This field is mandatory.
Description - The education description. This field is mandatory.
Comment - The user may add appropriate comments or notes. This field is optional.

Maintain Education Trainers

To Maintain Education Trainers:

1. Click Tables on the Vendor Management main menu.
2. Click on Education Codes.
3. Click Education Trainers as shown below:



The Maintain Education Trainers window is displayed:

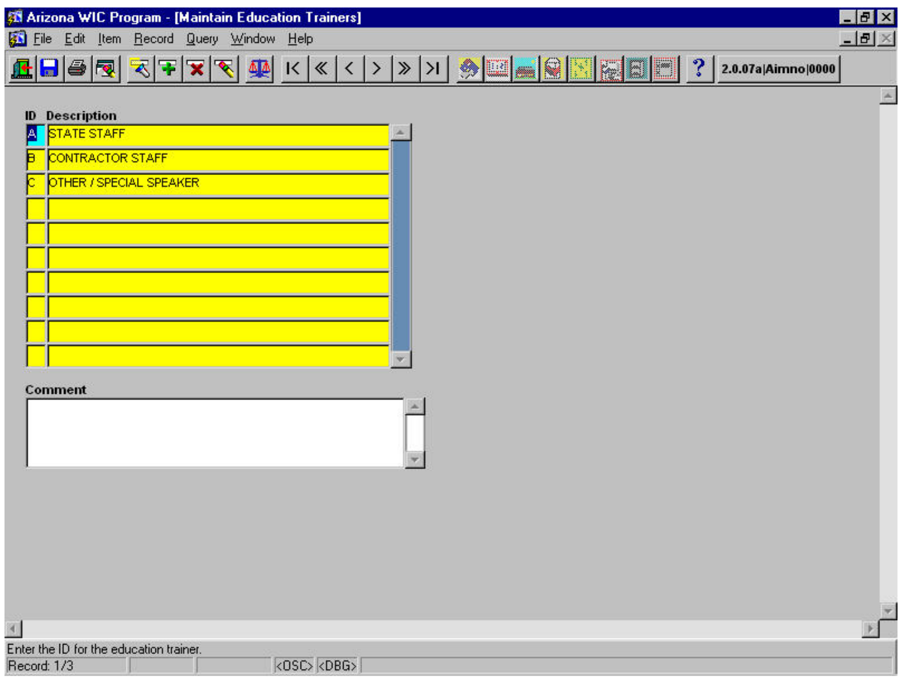


Figure 29 – Maintain Education Trainers

Add Education Trainers

1. The System defaults the cursor to highlight the ID number under the first entry in the ID field. The System also displays the Description and any existing Comments for that Education Trainers.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the ID and Description fields for you to add a new Education Trainer.
3. In the ID field, enter a number for the new Education Trainer to be added. If the ID you choose is already in use for another Education Trainer, the System displays a pop-up window indicating: "Row already exists with same ID." Click the OK button, delete the ID number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Education Trainer.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Education Trainer

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Education Trainer being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Education Trainer.
7. Update the Education Trainer as needed. (*Note: The System will not allow updates to the ID itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Education Trainer

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the ID fields.
4. In the appropriate field, enter either the ID or the Description of the Education Trainer being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Education Trainer.
7. Verify that the information being displayed is for the Education Trainer to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Education Trainer.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

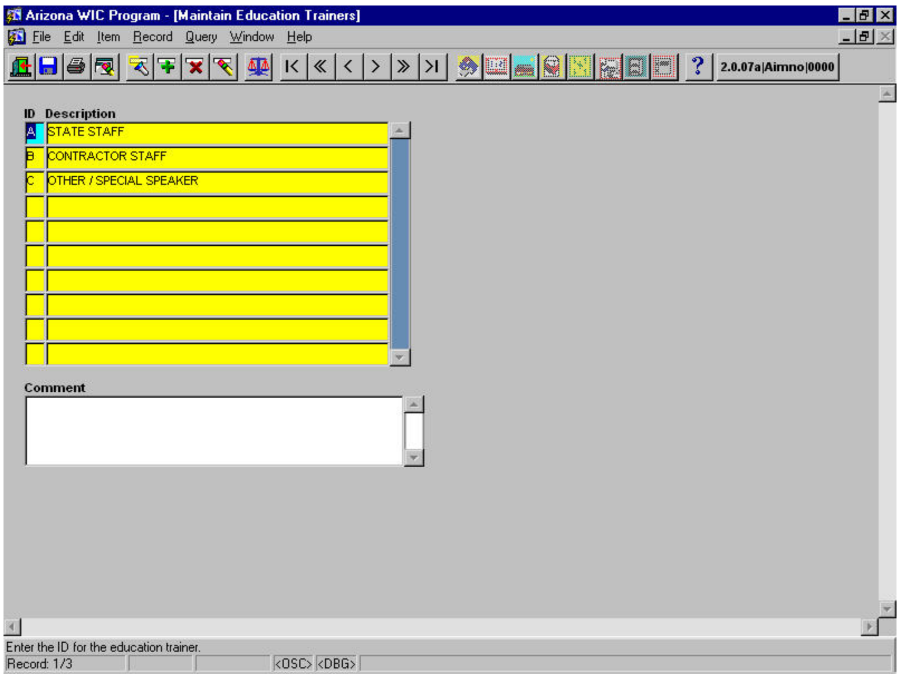


Figure 29 – Maintain Education Trainers

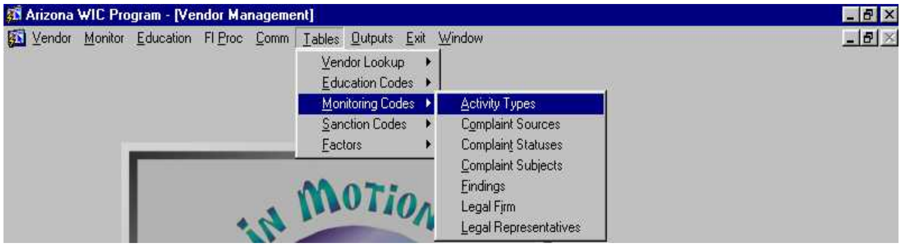
Fields

ID - The user-defined identification for the education trainer. This field is mandatory.
Description - The description for the education trainer. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Activity Types

To Maintain Activity Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Monitoring Codes.
3. Click Activity Types as shown below:



The Maintain Activity Types window is displayed:

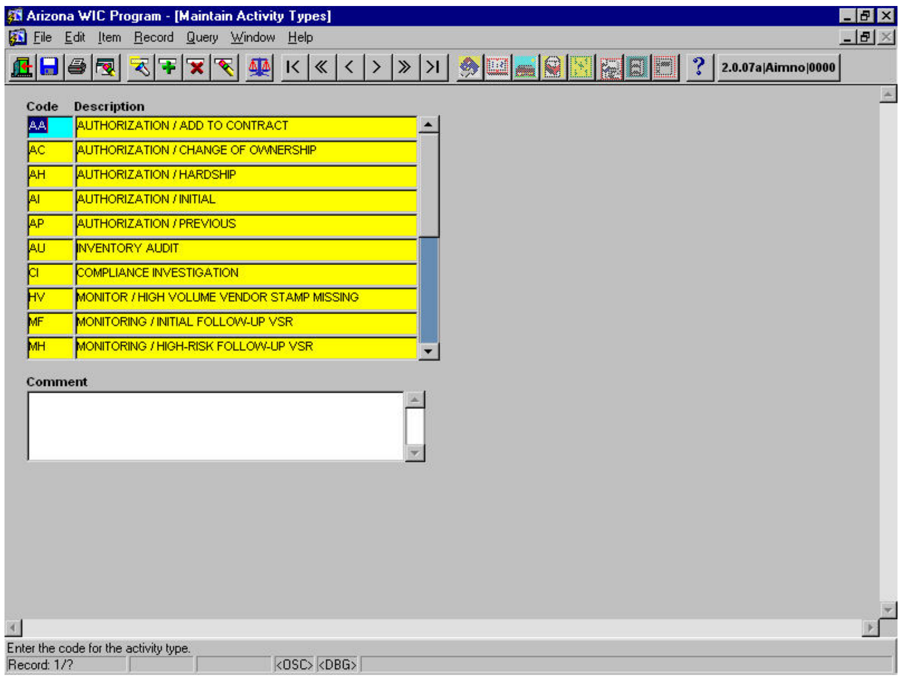


Figure 30 – Maintain Activity Types

Add Activity Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Activity Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Activity Type.
3. In the Code field, enter a number for the new Activity Type to be added. If the code you choose is already in use for another Activity Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Activity Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update an Activity Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Activity Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Activity Type.
7. Update the Activity Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete an Activity Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Activity Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Activity Type.
7. Verify that the information being displayed is for the Activity Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Activity Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

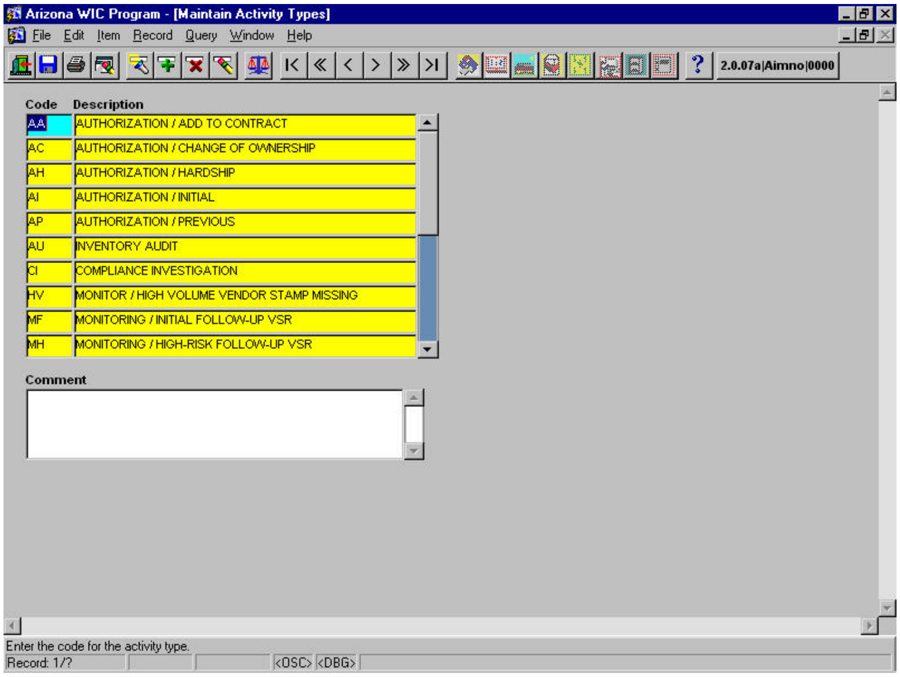


Figure 30 – Maintain Activity Types

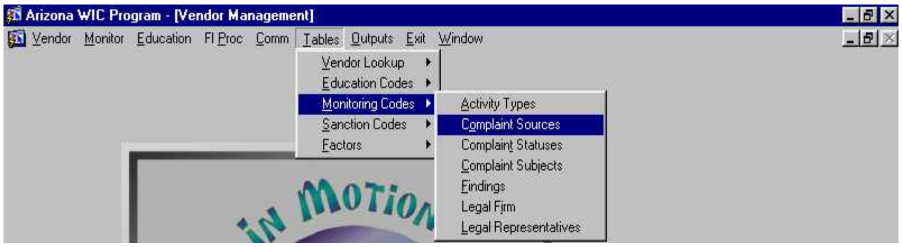
Fields

Code - The user-defined identification for the activity type. This field is mandatory.
Description - The description for the activity type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Complaint Sources

To Maintain Complaint Sources:

1. Click Tables on the Vendor Management main menu.
2. Click on Monitoring Codes.
3. Click Complaint Sources as shown below:



The Maintain Complaint Sources window is displayed:

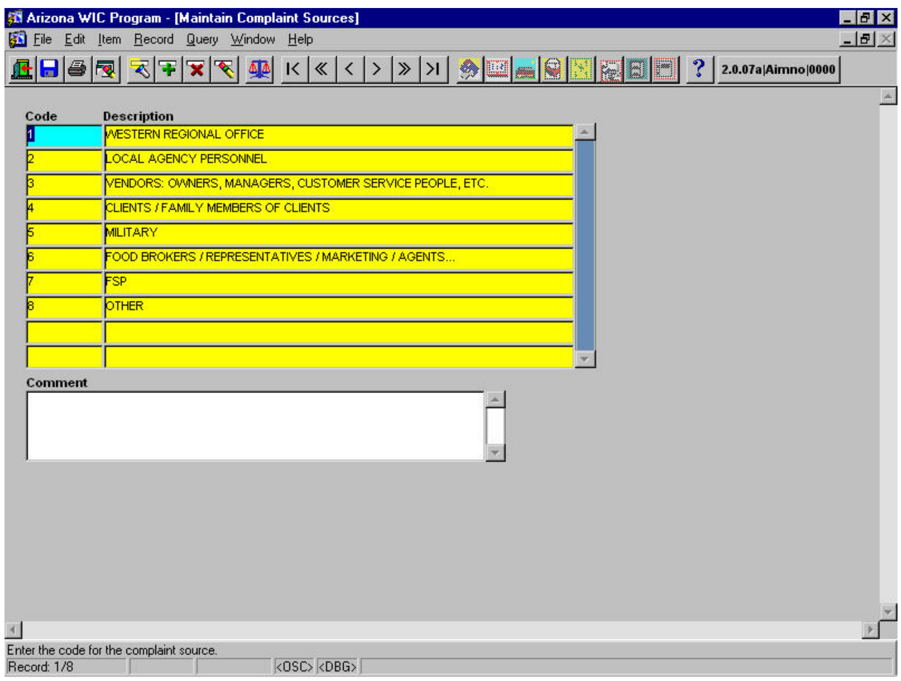


Figure 31 – Complaint Sources

Add Complaint Sources

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Complaint Source.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Complaint Source.
3. In the Code field, enter a number for the new Complaint Source to be added. If the code you choose is already in use for another Complaint Source, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Complaint Source.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Complaint Source

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Complaint Source being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Complaint Source.
7. Update the Complaint Source as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Complaint Source

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Complaint Source being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Complaint Source.
7. Verify that the information being displayed is for the Complaint Source to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Complaint Source.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 31 – Complaint Sources

Fields

Code - The user-defined identification for the complaint source. This field is mandatory.
Description - The description for the complaint source. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Complaint Statuses

To Maintain Complaint Statuses:

1. Click Tables on the Vendor Management main menu.
2. Click on Monitoring Codes.
3. Click Complaint Statuses as shown below:

The Maintain Complaint Statuses window is displayed:

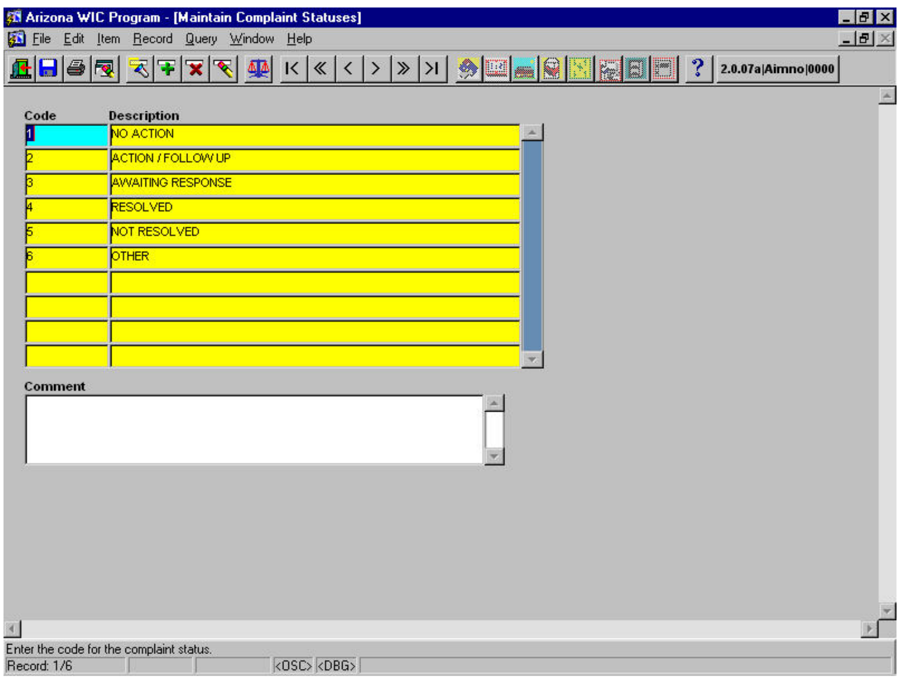


Figure 32 – Maintain Complaint Statuses

Add Complaint Statuses

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Complaint Status.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Complaint Status.
3. In the Code field, enter a number for the new Complaint Status to be added. If the code you choose is already in use for another Complaint Status, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Complaint Status.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Complaint Status

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Complaint Status being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Complaint Status.
7. Update the Complaint Status as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Complaint Status

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Complaint Status being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Complaint Status.
7. Verify that the information being displayed is for the Complaint Status to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Complaint Status.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 32 – Maintain Complaint Statuses

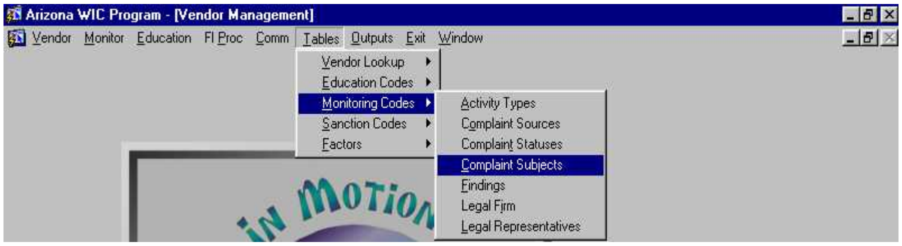
Fields

Code - The user-defined identification for the complaint status. This field is mandatory.
Description - The description for the complaint status. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Complaint Subject

To Maintain Complaint Subjects:

1. Click Tables on the Vendor Management main menu.
2. Click on Monitoring Codes.
3. Click Complaint Subjects as shown below:



The Maintain Complaint Subjects window is displayed:

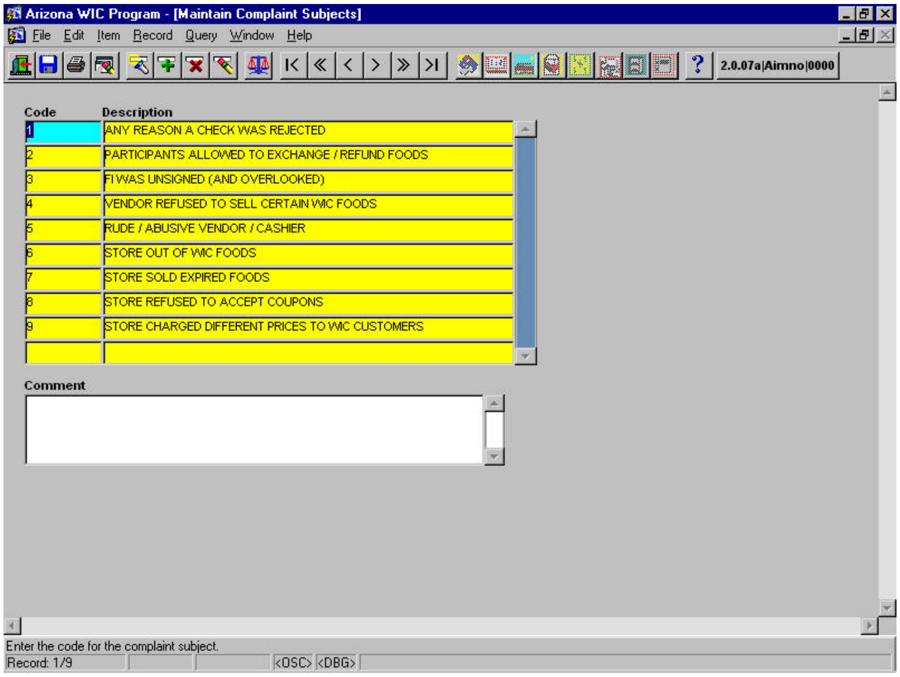


Figure 33 – Maintain Complaints Subjects

Add Complaint Subjects

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Complaint Subject.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Complaint Subject.
3. In the Code field, enter a number for the new Complaint Subject to be added. If the code you choose is already in use for another Complaint Subject, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Complaint Subject.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Complaint Subject

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Complaint Subject being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Complaint Subject.
7. Update the Complaint Subject as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Complaint Subject

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Complaint Subject being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Complaint Subject.
7. Verify that the information being displayed is for the Complaint Subject to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Complaint Subject.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

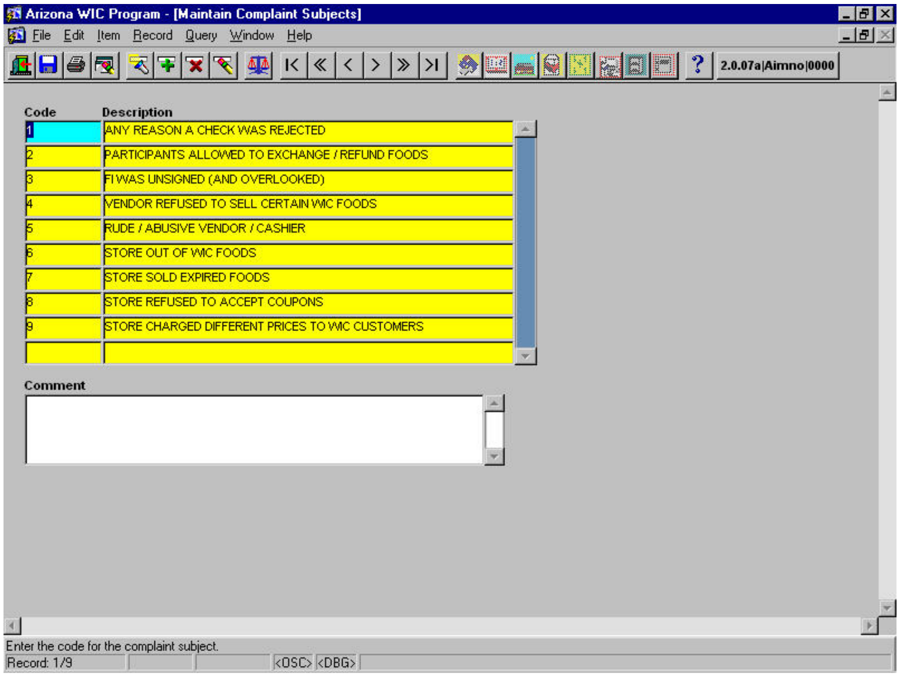


Figure 33 – Maintain Complaints Subjects

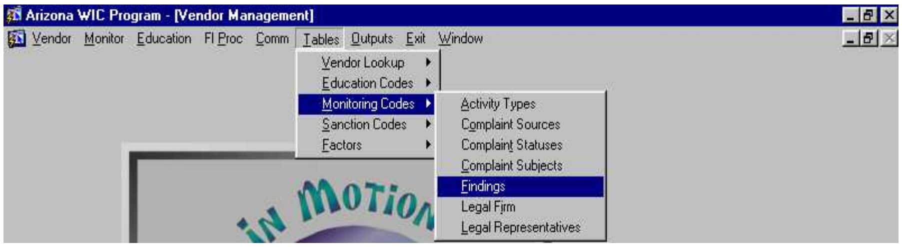
Fields

ID - The user-defined identification for the complaint subject. This field is mandatory.
Description - The description for the complaint subject. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Finding Types

To Maintain Findings:

1. Click Tables on the Vendor Management main menu.
2. Click on Monitoring Codes.
3. Click Findings as shown below:



The Maintain Findings window is displayed:

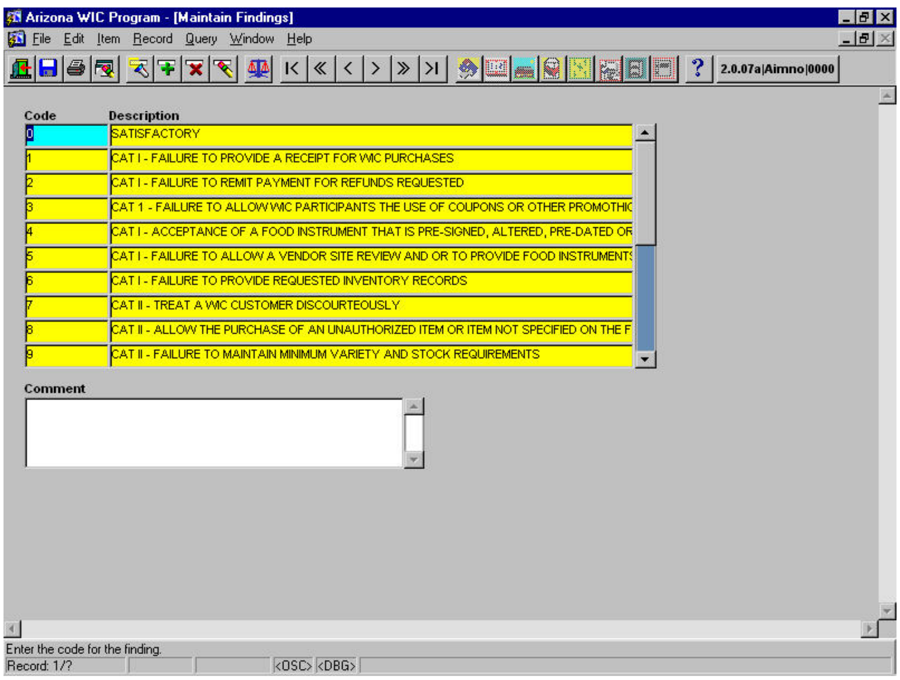


Figure 34 – Maintain Findings

Add Findings

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Finding.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Finding.
3. In the Code field, enter a number for the new Finding to be added. If the code you choose is already in use for another Finding, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Finding.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Finding

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Finding being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Finding.
7. Update the Finding as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Finding

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Finding being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Finding.
7. Verify that the information being displayed is for the Finding to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Finding.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 34 – Maintain Findings

Fields

Code - The user-defined code for the finding type. This field is mandatory.

Description - The description for the finding type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Legal Firms

To Maintain Legal Firms:

1. Click Tables on the Vendor Management main menu.
2. Click on Monitoring Codes.
3. Click Legal Firms as shown below:

The Maintain Legal Firms window is displayed:

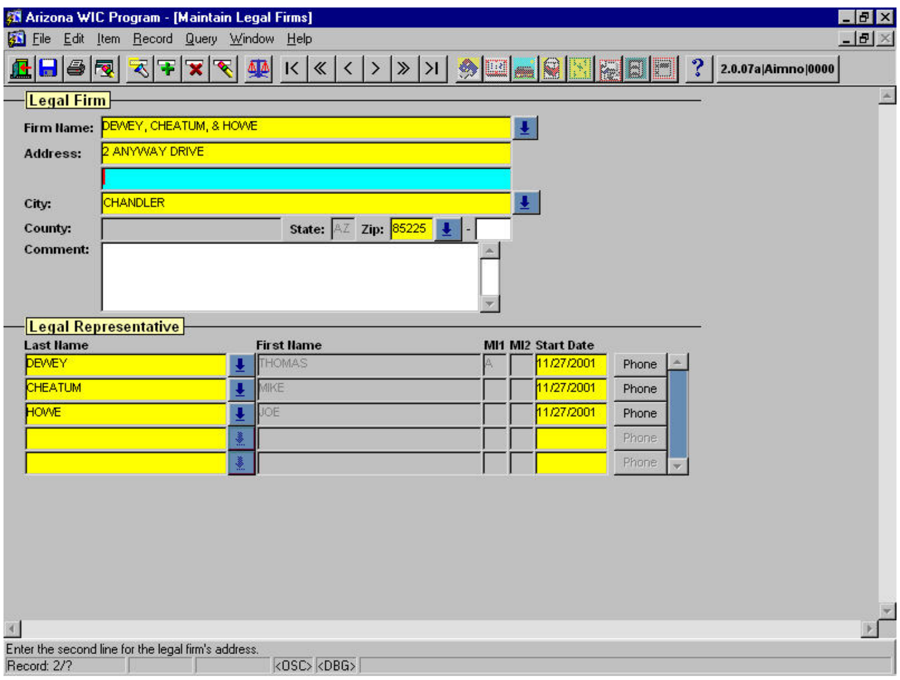


Figure 35 – Maintain Legal Firms

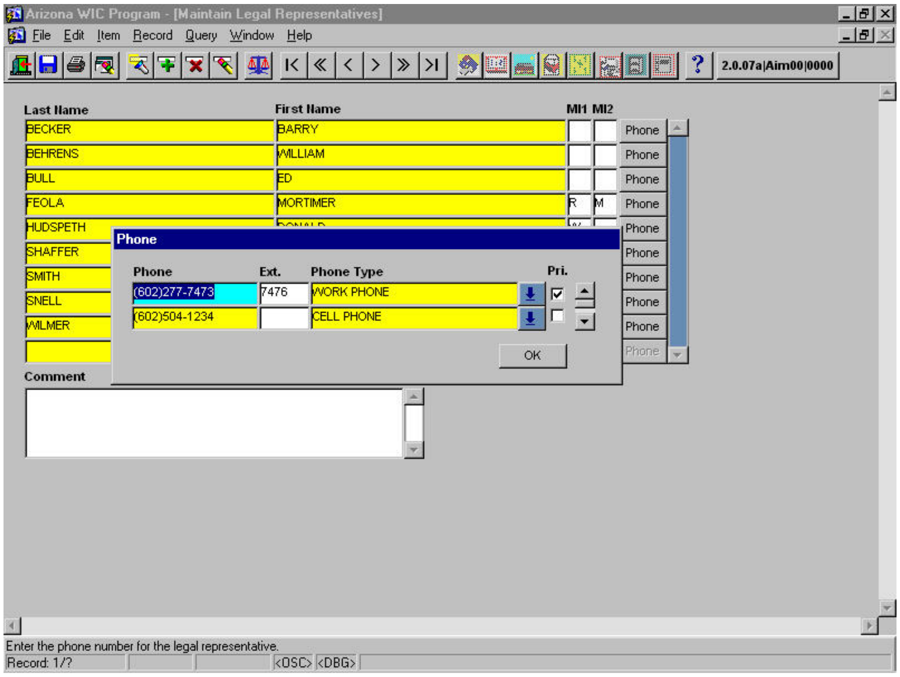


Figure 36 – Maintain Legal Representative Telephone (s)

Add Legal Firms

1. The System defaults the cursor to highlight the name in the Firm Name field. The System also displays the Address and any existing Comments for that Legal Firm.
2. Click the Insert Record icon on the toolbar. The System creates a blank record for you to add a new Legal Firm.
3. TAB to the Address fields and enter the Address of the new Legal Firm.
4. TAB to the Comment field and enter any applicable comments.
5. TAB to the Legal Representative section of the screen and fill in the name, start date and phone for any representatives at the firm.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Legal Firm

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Firm Name field.
4. In the appropriate field, enter either the Name or the Address of the Legal Firm being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Legal Firm.
7. Update the Legal Firm as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Legal Firm

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Firm Name fields.
4. In the appropriate field, enter either the Name or the Address of the Legal Firm being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Legal Firm.
7. Verify that the information being displayed is for the Legal Firm to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Legal Firm.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 35 – Maintain Legal Firms

Fields (Legal Firm section)

Firm Name - The Legal Firm is chosen here. This field is mandatory.
Address - The address of the Legal Firm. The first line of address information is mandatory; the second line is optional.
City - The city in which the Legal Firm is located. This field is mandatory and is selected from a list of values. Selection of a city will also fill in the state and county information. For more information, please refer to window: Maintain Locales.
County - The county in which the Legal Firm is located. This field is display only. It will be filled in when a city or zip is selected.
State - The state in which the Legal Firm is located. This field is display only. It will be filled in when a city or zip is selected.
Zip - The Legal Firm's zip code. This field is mandatory and entered from the list of values. Selection of a zip code also fills in the state and city information. The zip plus 4 is optional and may be entered by the user. For more information, please refer to window: Maintain Zip Codes.
Comment - The user may provide any comments or remarks. This field is optional.

Fields (Legal Representative section)

Last Name - The last name of the Legal Representative employed with the Legal Firm. This field is optional and can be selected from a list of values.
First Name - The first name of the Legal Representative employed with the Legal Firm. This field is display only.
MI1 - The first initial of the Legal Representative employed with the Legal Firm. This field is display only. For more information please refer to window: Maintain Legal Representatives.
MI2 - The second middle initial of the Legal Representative employed with the Legal Firm. This field is display only.
Start Date - The employment start date of the Legal Representative. This field is optional.

Push Button(s)

Phone - Brings up the phone window for the Legal Representative.

Figure 36 – Maintain Legal Representative Telephone (s)

Fields

Last Name - The last name of the Legal Representative employed with the Legal Firm. This field is optional and can be selected from a list of values.
First Name - The first name of the Legal Representative employed with the Legal Firm. This field is display only.
MI1 - The first initial of the Legal Representative employed with the Legal Firm. This field is display only. For more information please refer to window: Maintain Legal Representatives.
MI2 - The second middle initial of the Legal Representative employed with the Legal Firm. This field is display only.
Comments – The user may provide any comments or remarks. This field is optional.

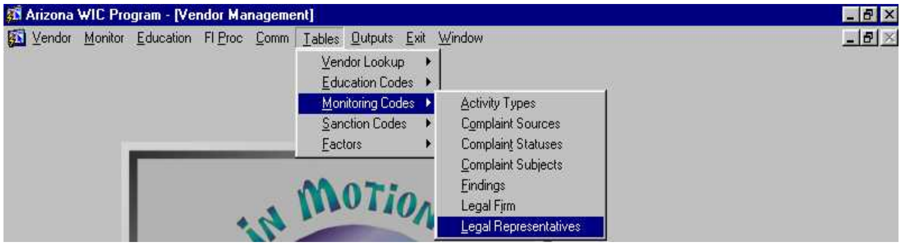
Push Button(s)

Phone - Brings up the phone window for the Legal Representative.

Maintain Legal Representatives

To Maintain Legal Representatives:

1. Click Tables on the Vendor Management main menu.
2. Click on Monitoring Codes.
3. Click Legal Representatives as shown below:



The Maintain Legal Representatives window is displayed:

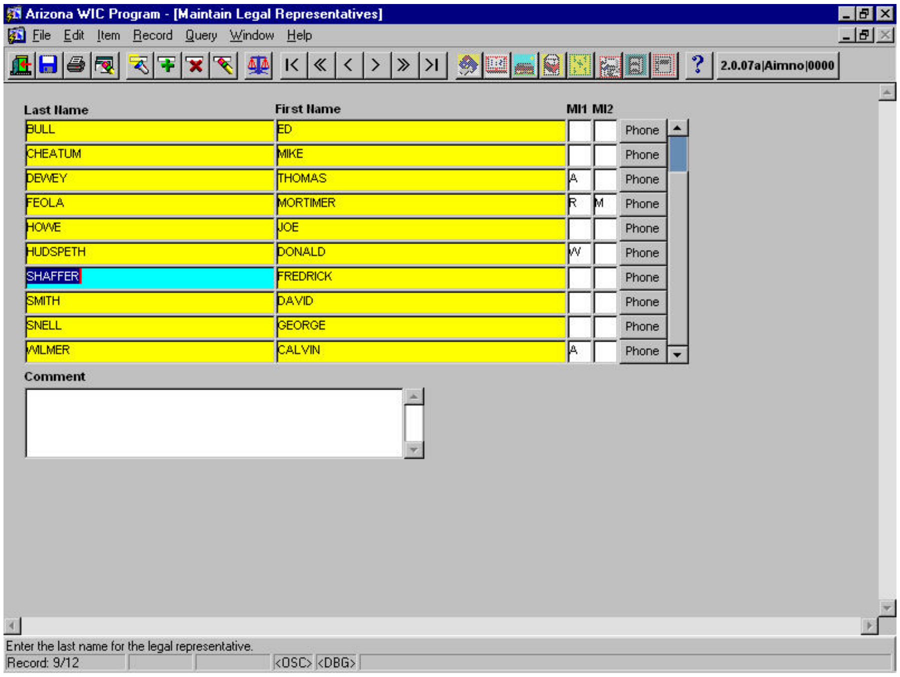


Figure 37 – Maintain Legal Representatives

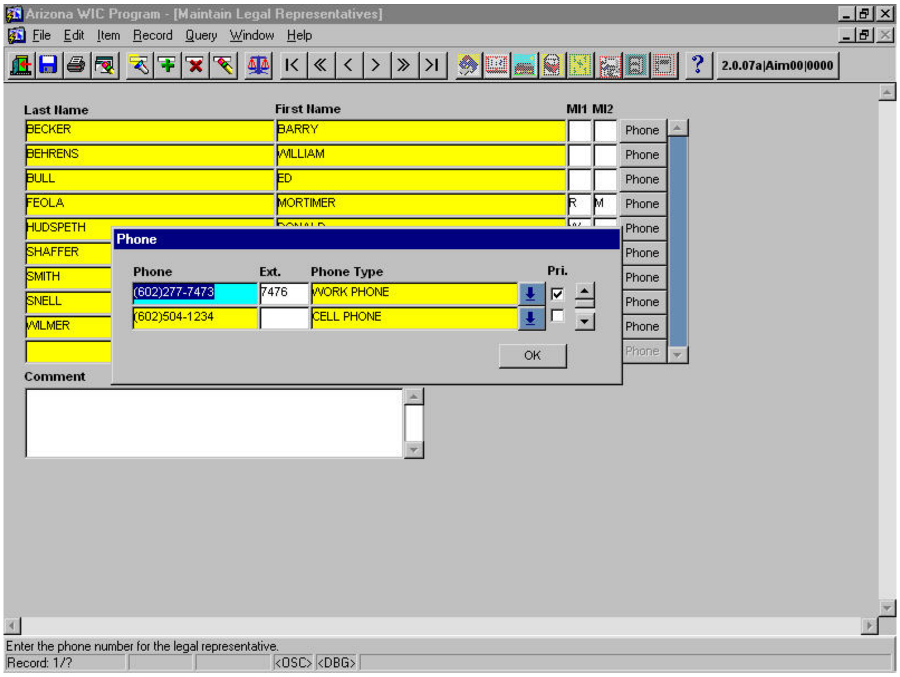


Figure 38 – Maintain Legal Representative Telephone (s)

Add Legal Representatives

1. The System defaults the cursor to highlight the name under the first entry in the Last Name field. The System also displays the First Name, Middle Initials, and any existing Comments for that Legal Representative.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Name fields for you to add a new Legal Representative.
3. Enter the Last Name of the new Legal Representative.
4. TAB to the First Name field and enter the first name of the new Legal Representative.
5. TAB to the MI fields, and enter the middle initials of the new Legal Representative.
6. Click on the Phone push button. The phone pop up screen appears. Complete the phone information for the new Legal Representative. Then click OK.
7. TAB to the Comment field and enter any applicable comments.
8. Click the Save icon.
9. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button.

Update a Legal Representative

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Last Name field.
4. In the appropriate field, enter the Last Name of the Legal Representative being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Legal Representative.
7. Update the Legal Representative as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Legal Representative

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Last Name fields.
4. In the appropriate field, enter either the Last Name of the Legal Representative being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Legal Representative.
7. Verify that the information being displayed is for the Legal Representative to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Legal Representative.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

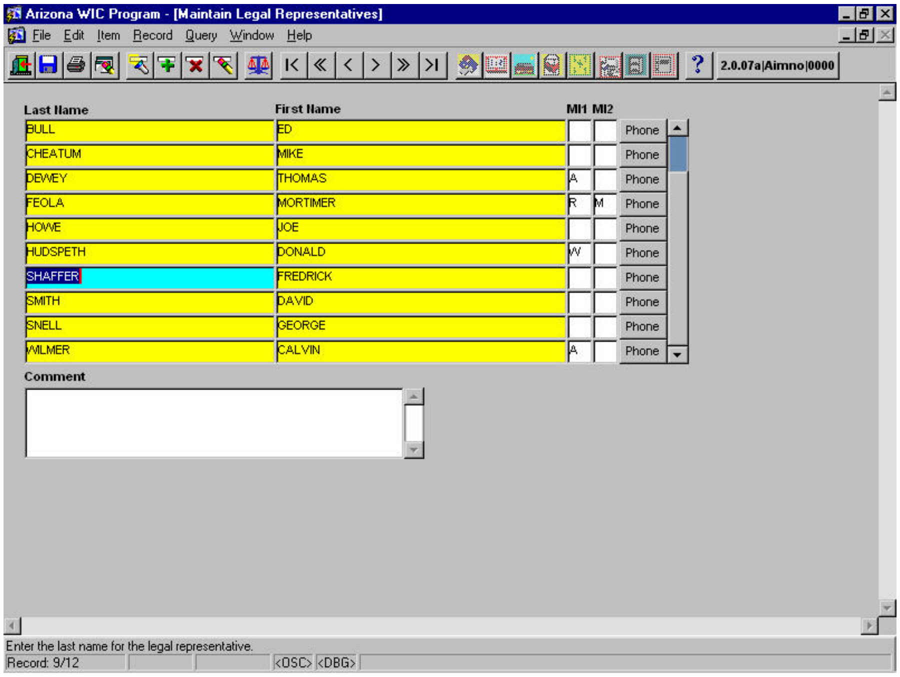


Figure 37 – Maintain Legal Representatives

Fields

Last Name - The last name of the Legal Representative. This field is mandatory.
First Name - The first name of the Legal Representative. This field is mandatory.
MI1 - The first middle initial of the Legal Representative. This field is optional.
MI2 - The second middle initial of the Legal Representative. This field is optional.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

Phone - Brings up the phone pop-up window.

Figure 38 – Maintain Legal Representative Telephone (s)

Fields

Phone - The phone number of the Legal Representative. One phone number is required for the Legal Representative; otherwise this field is optional.
Ext. - The extension of the Legal Representative. This field is optional.
Phone Type - The type of phone/telecommunications device. This field is mandatory if Phone is filled in. This field can be chosen from a list of values. For more information, please refer to the Phone Type table in Systems Administration.

Checkboxes

(Pri) Primary Phone - A check box that indicates one of the phone numbers is the primary phone. If at least one Phone is entered, the user must designate one as primary by clicking on the check box to the right of the selected phone number.

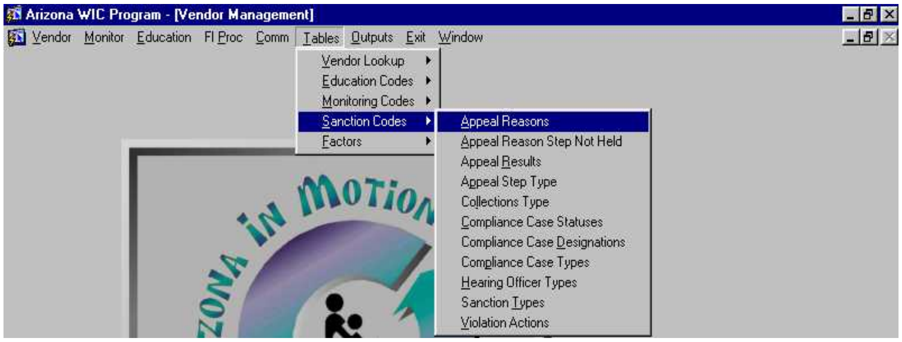
Push Buttons

OK -

Maintain Appeal Reasons

To Maintain Appeal Reasons:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Appeal Reasons as shown below:



The Maintain Appeal Reasons window is displayed:

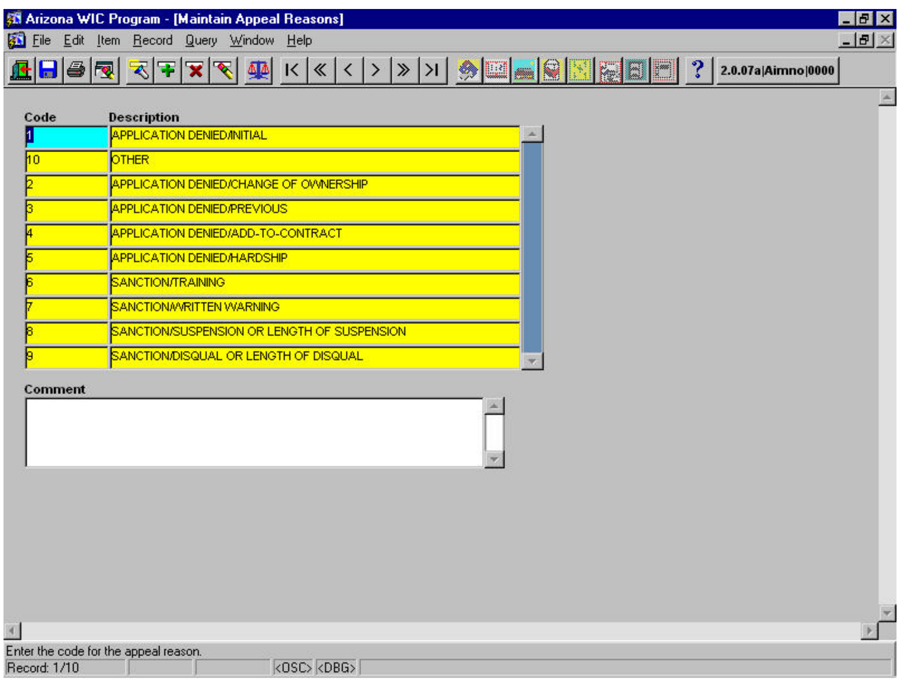


Figure 39 – Maintain Appeal Reasons

Add Appeal Reasons

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Appeal Reason.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Appeal Reason.
3. In the Code field, enter a number for the new Appeal Reason to be added. If the code you choose is already in use for another Appeal Reason, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Appeal Reason.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Appeal Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Reason being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Reason.
7. Update the Appeal Reason as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Appeal Reason

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Reason being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Reason.
7. Verify that the information being displayed is for the Appeal Reason to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Appeal Reason.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

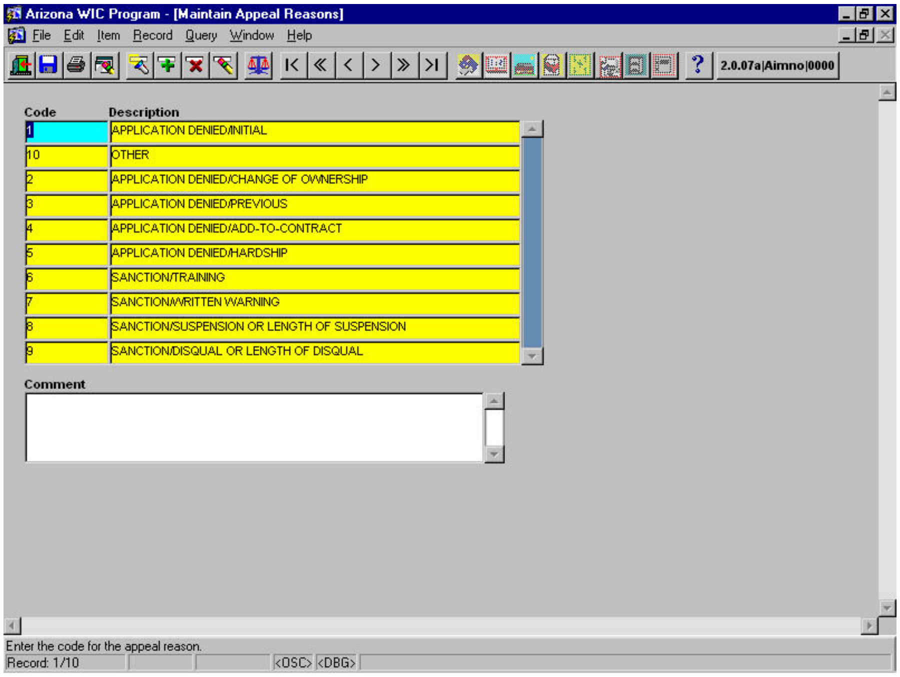


Figure 39 – Maintain Appeal Reasons

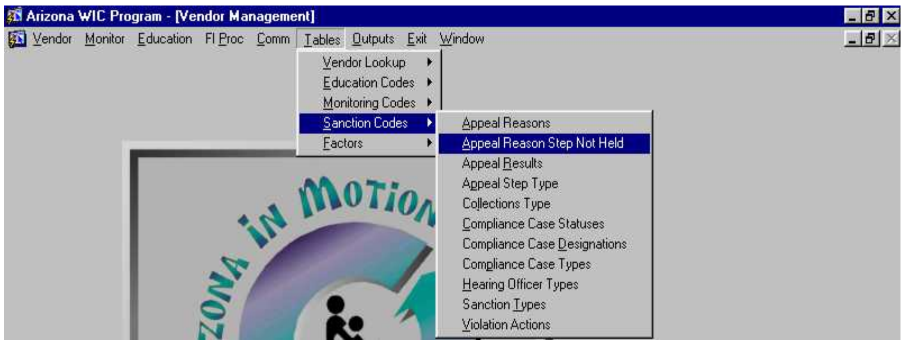
Fields

Code - The user-defined identification for the Appeal reason. This field is mandatory.
Description - The description for the Appeal reason. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Appeal Reason not Held

To Maintain Appeal Reason Not Held:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Appeal Reason Step Not Held as shown below:



The Maintain Appeal Reason Not Held window is displayed:

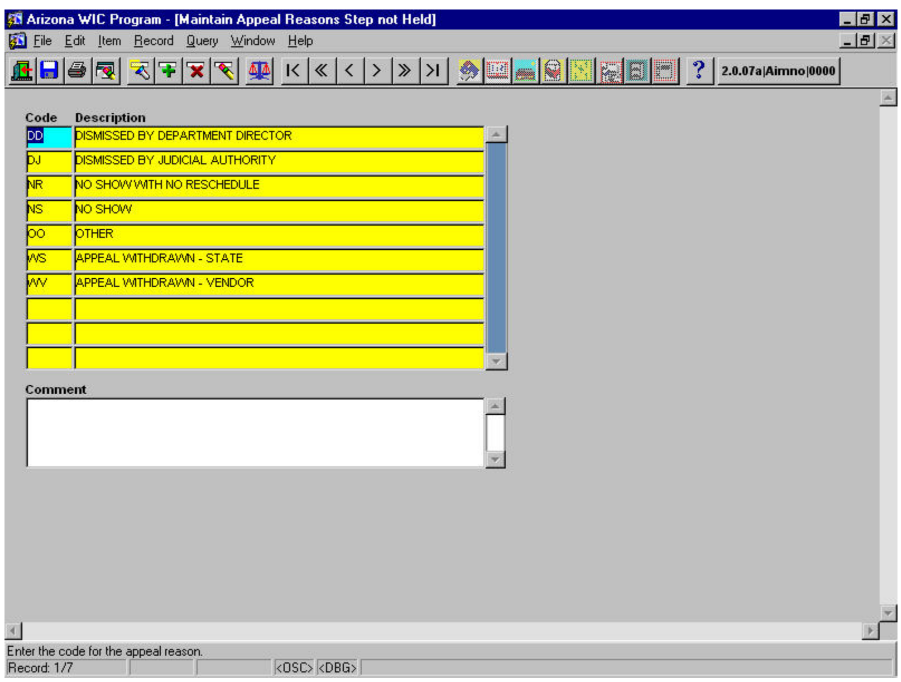


Figure 40 – Maintain Appeal Reasons Step not Held

Add Appeal Reason Not Held

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Appeal Reason Not Held.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Appeal Reason Not Held.
3. In the Code field, enter a number for the new Appeal Reason Not Held to be added. If the code you choose is already in use for another Appeal Reason Not Held, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Appeal Reason Not Held.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Appeal Reason Not Held

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Reason Step Not Held being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Reason Not Held.
7. Update the Appeal Reason Not Held as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update."*)
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Appeal Reason Not Held

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Reason Not Held being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Reason Not Held.
7. Verify that the information being displayed is for the Appeal Reason Not Held to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Appeal Reason Not Held.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

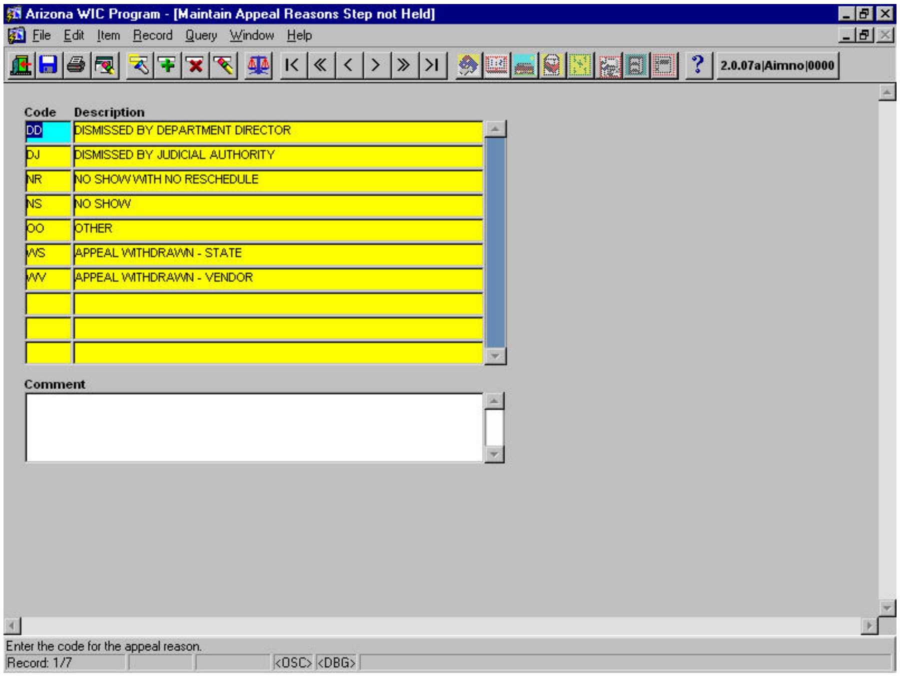


Figure 40 – Maintain Appeal Reasons Step not Held

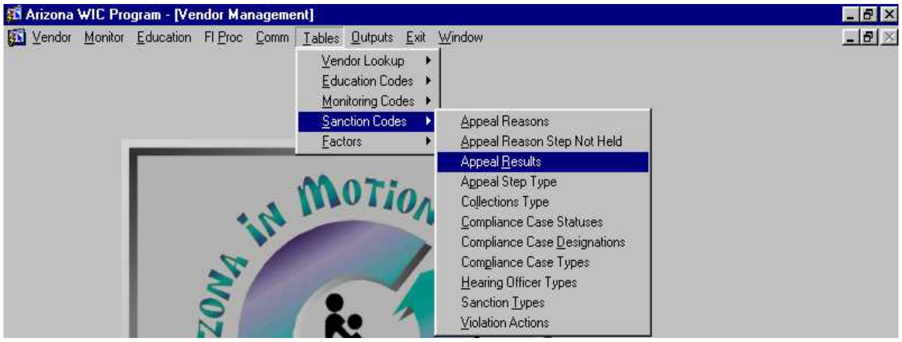
Fields

Code - The user-defined identification for the reason the Appeal step was not held. This field is mandatory.
Description - The description for the reason the Appeal step was not held. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Appeal Results

To Maintain Appeal Results:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Appeal Results as shown below:



The Maintain Appeal Results window is displayed:

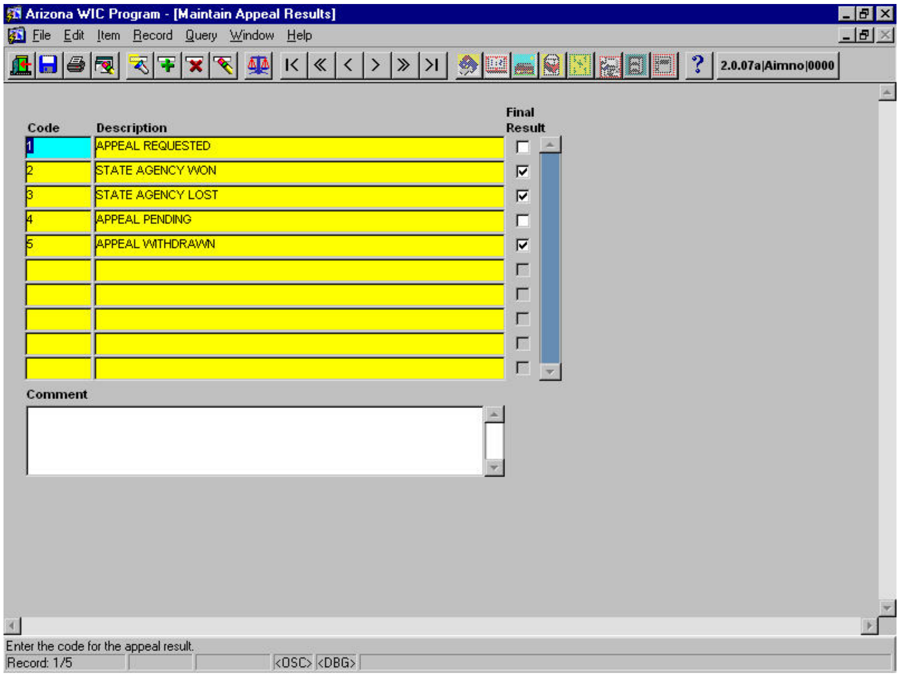


Figure 41 – Maintain Appeal Results

Add Appeal Results

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Appeal Result.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Appeal Result.
3. In the Code field, enter a number for the new Appeal Result to be added. If the code you choose is already in use for another Appeal Result, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Appeal Result.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Final Result checkbox if this result is a Final Result.
7. Click the Save icon.
8. The system displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Update Appeal Results

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Result being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Result.
7. Update the Appeal Result as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Final Result checkbox if this result is a Final Result.
9. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button.

Delete Appeal Results

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Result being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Result.
7. Verify that the information being displayed is for the Appeal Result to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Final Result checkbox if this result is a Final Result.
10. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
11. Click the OK button to successfully delete the Appeal Result.
12. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 41 – Maintain Appeal Results

Fields

Code - The user-defined identification for the Appeal result. This field is mandatory.
Description - The description for the Appeal result. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

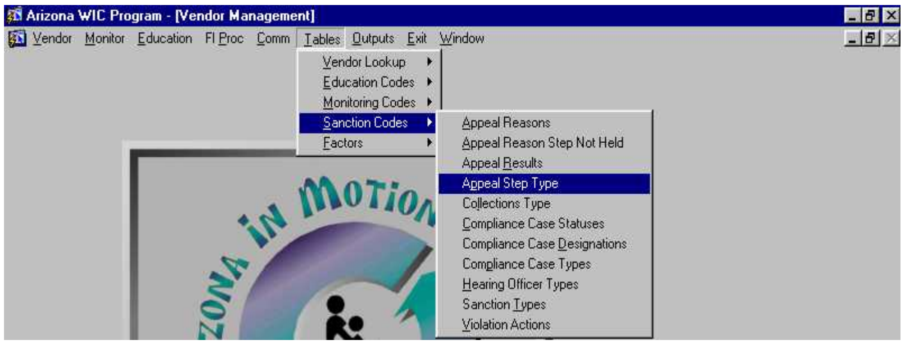
Checkbox

Final Result - A check box that indicates a result of this type is the final result for an Appeal, and the close date for the Appeal is required on the Appeal.

Maintain Appeal Step Types

To Maintain Appeal Step Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Appeal Step Types as shown below:



The Maintain Appeal Step Types window is displayed:

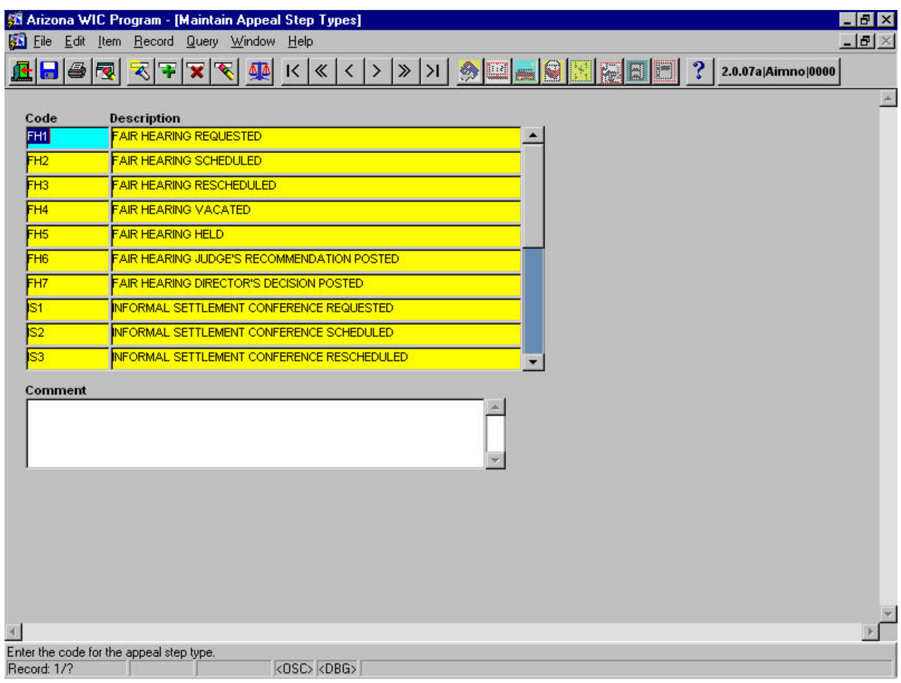


Figure 42 – Maintain Appeal Step Types

Add Appeal Step Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Appeal Step Types.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Appeal Step Types.
3. In the Code field, enter a number for the new Appeal Step Types to be added. If the code you choose is already in use for another Appeal Step Types, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Appeal Step Types.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Appeal Step Types

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Step Types being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Step Types.
7. Update the Appeal Step Types as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Appeal Step Types

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Appeal Step Types being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Appeal Step Types.
7. Verify that the information being displayed is for the Appeal Step Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Appeal Step Types.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 42 – Maintain Appeal Step Types

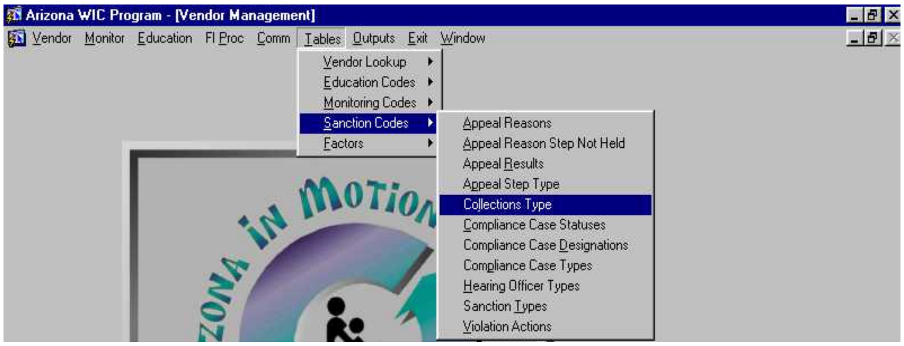
Fields

Code - The user-defined identification for the Appeal step type. This field is mandatory.
Description - The description for the Appeal step type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Collections Type

To Maintain Collections Type:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Collections Type as shown below:



The Maintain Collections Type window is displayed:

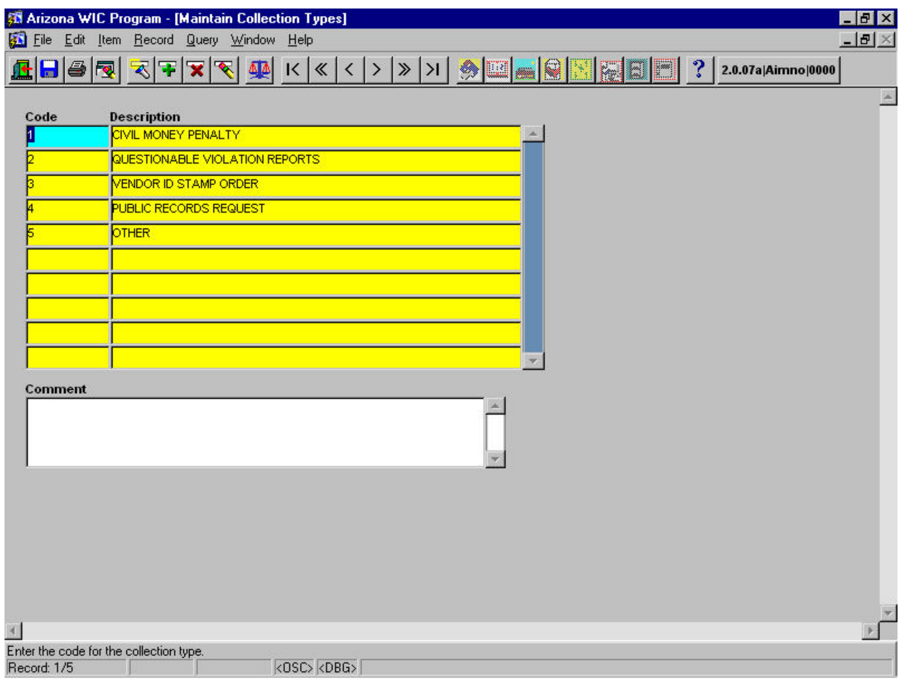


Figure 43 – Maintain Collections Type

Add Collections Type

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Collections Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Collections Type.
3. In the Code field, enter a number for the new Collections Type to be added. If the code you choose is already in use for another Collections Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Collections Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Collections Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Collections Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Collections Type.
7. Update the Collections Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Collections Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Collections Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Collections Type.
7. Verify that the information being displayed is for the Collections Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Collections Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 43 – Maintain Collections Type

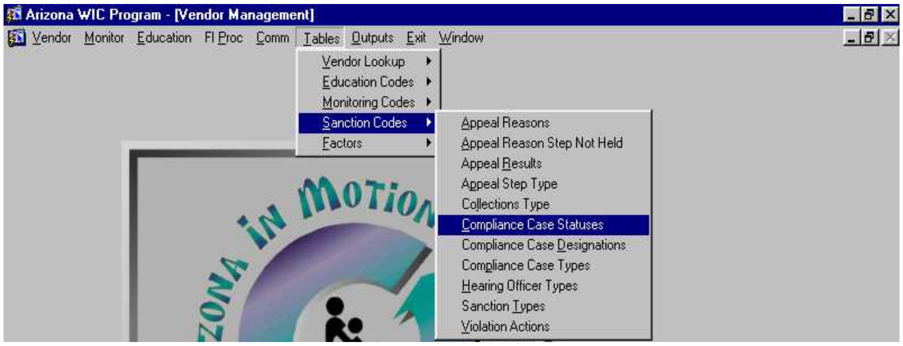
Fields

Code - The user-defined identification for the Collections type. This field is mandatory.
Description - The description for the Collections type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Compliance Case Status

To Maintain Compliance Case Statuses:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Compliance Case Statuses as shown below:



The Maintain Compliance Case Statuses window is displayed:

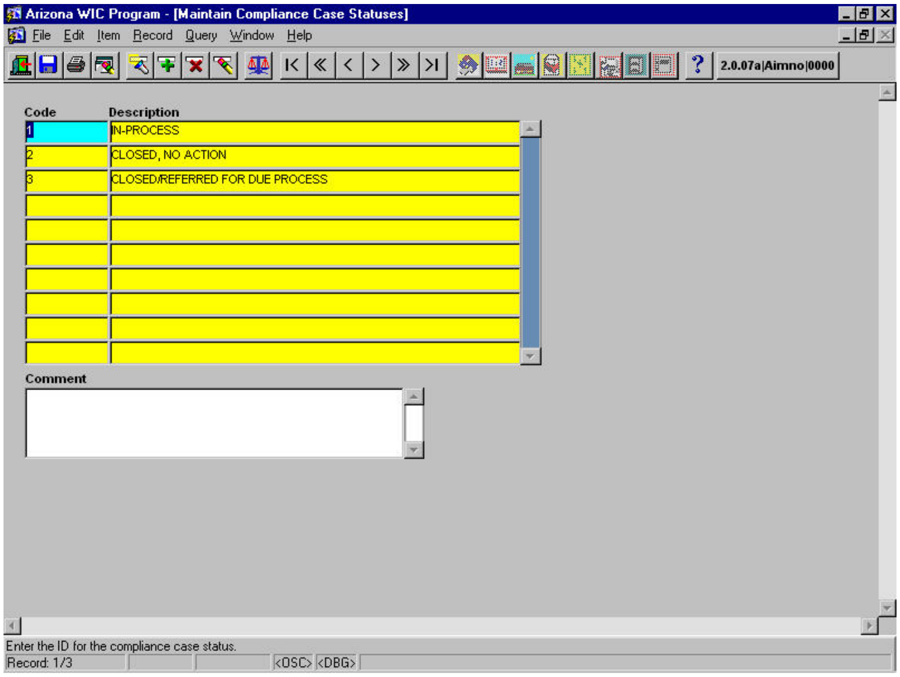


Figure 44 – Maintain Compliance Case Statuses

Add Compliance Case Statuses

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Compliance Case Status.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Compliance Case Status.
3. In the Code field, enter a number for the new Compliance Case Status to be added. If the code you choose is already in use for another Compliance Case Status, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Compliance Case Status.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Compliance Case Status

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Compliance Case Status being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Compliance Case Status.
7. Update the Compliance Case Status as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Compliance Case Status

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Compliance Case Status being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Compliance Case Status.
7. Verify that the information being displayed is for the Compliance Case Status to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Compliance Case Status.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

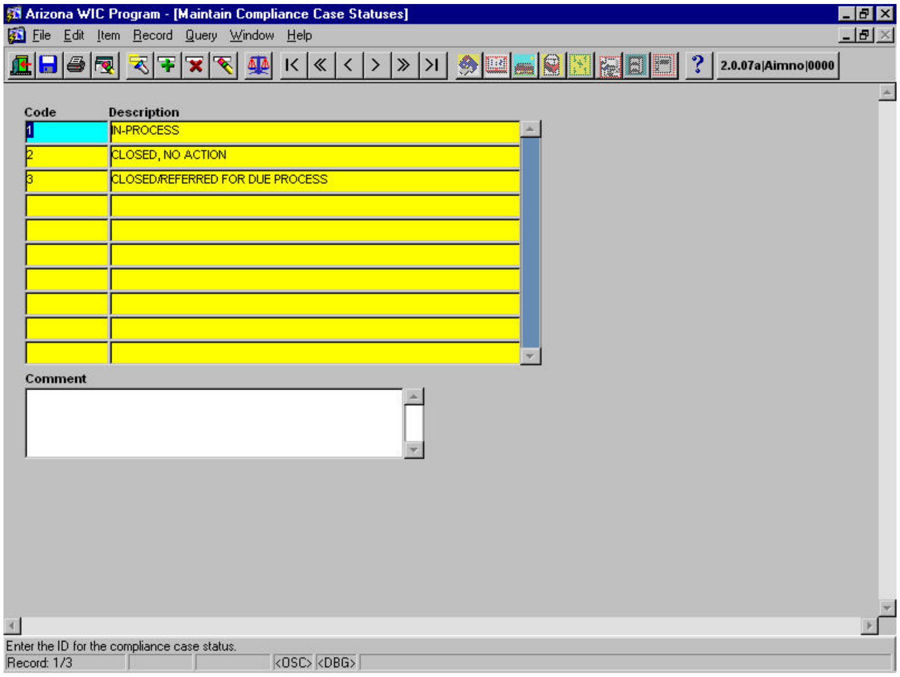


Figure 44 – Maintain Compliance Case Statuses

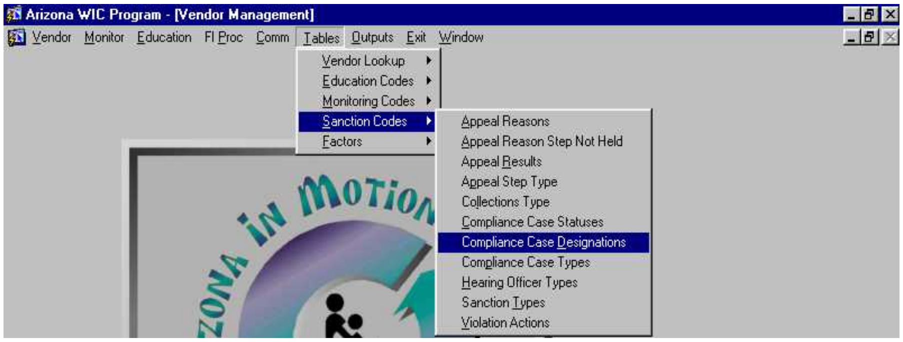
Fields

Code - The user-defined identification for the case status. This field is mandatory.
Description - The description for the case status. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional

Maintain Compliance Case Designations

To Maintain Compliance Case Designations:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Compliance Case Designations as shown below:



The Maintain Compliance Case Designations window is displayed:

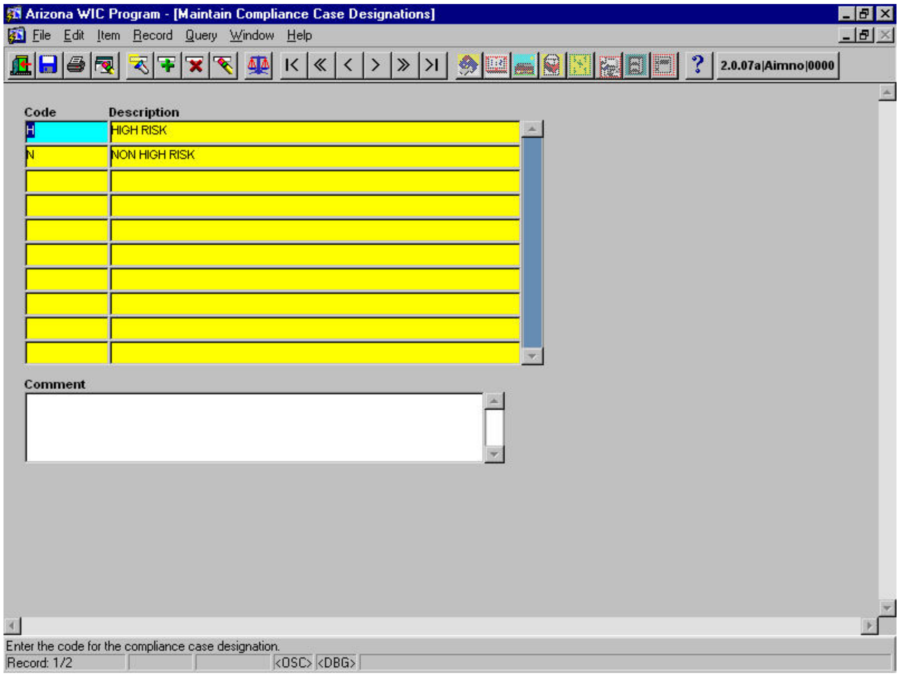


Figure 45 – Maintain Compliance Case Designations

Add Compliance Case Designations

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Compliance Case Designation.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Compliance Case Designation.
3. In the Code field, enter a number for the new Compliance Case Designation to be added. If the code you choose is already in use for another Compliance Case Designation, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Compliance Case Designation.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Compliance Case Designation

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Compliance Case Designation being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Compliance Case Designation.
7. Update the Compliance Case Designation as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Compliance Case Designation

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Compliance Case Designation being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Compliance Case Designation.
7. Verify that the information being displayed is for the Compliance Case Designation to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Compliance Case Designation.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 45 – Maintain Compliance Case Designations

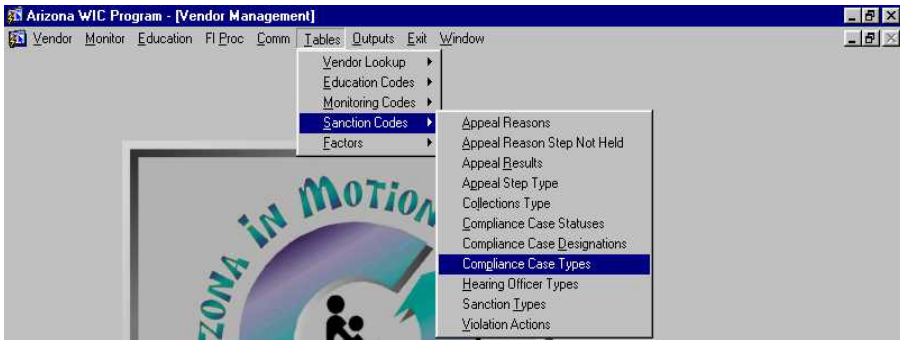
Fields

Code - The user-defined code for the designation. This field is mandatory.
Description - The description for the designation. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Compliance Case Type

To Maintain Compliance Case Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Compliance Case Types as shown below:



The Maintain Compliance Case Types window is displayed:

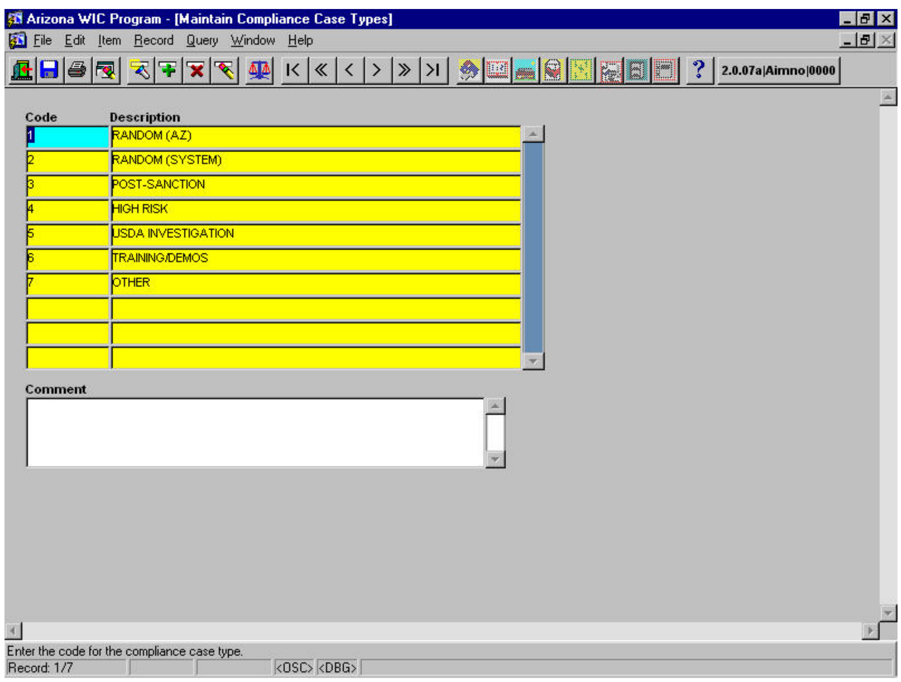


Figure 46 – Maintain Compliance Case types

Add Compliance Case Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Compliance Case Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Compliance Case Type.
3. In the Code field, enter a number for the new Compliance Case Type to be added. If the code you choose is already in use for another Compliance Case Type, the System displays a pop-up window indicating: “Row already exists with same Code.” Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Compliance Case Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: “Transaction completed.”
8. Click the OK button.

Update a Compliance Case Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Compliance Case Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Compliance Case Type.
7. Update the Compliance Case Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: “Field is protected against update.”)*
8. Click the Save icon. The System displays a pop-up window indicating: “Transaction completed.”
9. Click the OK button.

Delete a Compliance Case Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Compliance Case Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Compliance Case Type.
7. Verify that the information being displayed is for the Compliance Case Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: “Transaction completed.”
10. Click the OK button to successfully delete the Compliance Case Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 46 – Maintain Compliance Case types

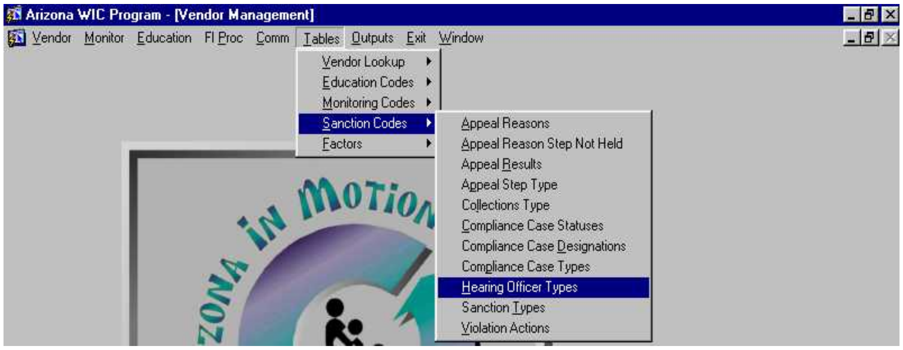
Fields

Code - The user-defined identification for the case type. This field is mandatory.
Description - The description for the case type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Hearing Officer Type

To Maintain Hearing Officer Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Hearing Officer Types as shown below:



The Maintain Hearing Officer Types window is displayed:

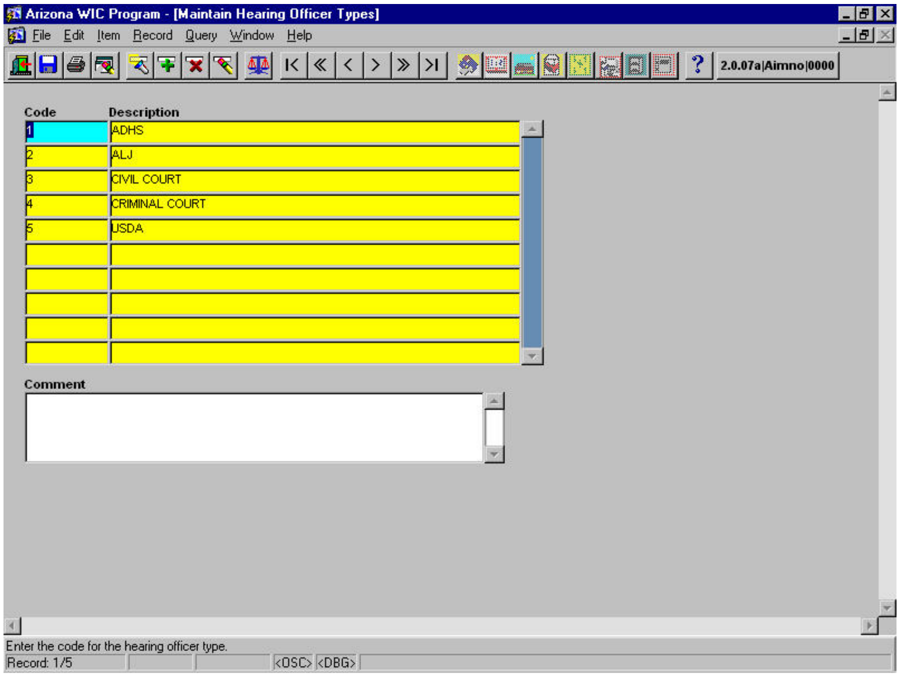


Figure 47 – Maintain Hearing Officer Types

Add Hearing Officer Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Hearing Officer Type.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Hearing Officer Type.
3. In the Code field, enter a number for the new Hearing Officer Type to be added. If the code you choose is already in use for another Hearing Officer Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Hearing Officer Type.
5. TAB to the Comment field and enter any applicable comments.
6. Click the Save icon.
7. The system displays a pop-up window indicating: "Transaction completed."
8. Click the OK button.

Update a Hearing Officer Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Hearing Officer Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Hearing Officer Type.
7. Update the Hearing Officer Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
9. Click the OK button.

Delete a Hearing Officer Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Hearing Officer Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Hearing Officer Type.
7. Verify that the information being displayed is for the Hearing Officer Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
10. Click the OK button to successfully delete the Hearing Officer Type.
11. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: "Query caused no records to be retrieved. Re-enter."

Figure 47 – Maintain Hearing Officer Types

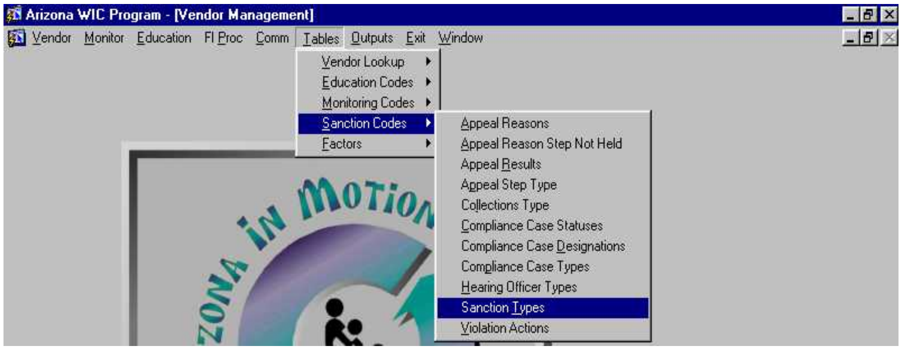
Fields

Code - The user-defined identification for the Hearing Officer Type. This field is mandatory.
Description - The description for the Hearing Officer Type. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Sanction Types

To Maintain Sanction Types:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Sanction Types as shown below::



The Maintain Sanction Types window is displayed:

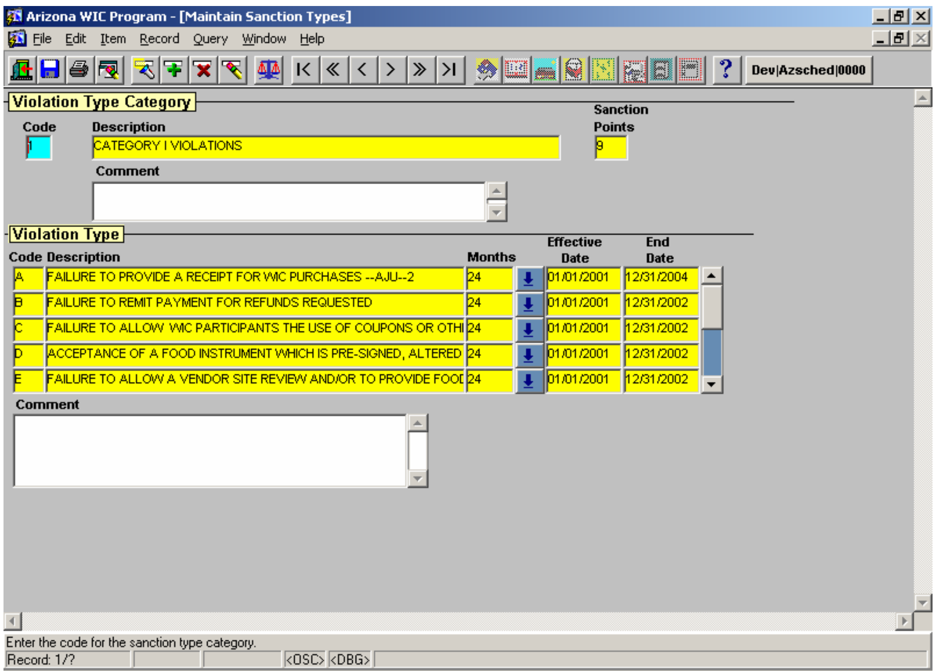


Figure 48 – Maintain Sanction Types

Add Sanction Type Categories and Types

1. The System defaults the cursor to highlight the code number under the first entry in the Code field. The System also displays the Description, Sanction Points and any existing Comments for that Violation Type Category.
2. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Violation Type Category.
3. In the Code field, enter a number for the new Sanction Type to be added. If the code you choose is already in use for another Sanction Type, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
4. TAB to the Description field and enter the description of the new Sanction Type.
5. TAB to the Points field and enter the amount of assessed to the vendor as a result of a violation category.
6. TAB to the Comment field and enter any applicable comments.
7. TAB to the Violation Type section and enter a code number for the new Sanction Type.
8. TAB and enter the Description for the Violation Type.
9. TAB and select the number of months the sanction type lasts from the list of values.
10. TAB and enter the Effective Date of the sanction type. Once this date is entered and saved, it cannot be modified.
11. TAB and enter the End Date of the sanction type. This field is modifiable after it has been saved.
12. Click the Save icon.
13. The system displays a pop-up window indicating: "Transaction completed."
14. Click the OK button.

Update a Sanction Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields of Violation Type Category.
4. In the appropriate field, enter either the Code or the Description of the Sanction Type being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Sanction Type.
7. Update the Sanction Type as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update."*)
8. TAB to the Violation Type section and enter a code number for the new Sanction Type.
9. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
10. Click the OK button.

Delete a Sanction Type

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields of Violation Type Category.
4. In the appropriate field, enter either the Code or the Description of the Sanction Type being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Sanction Type.
7. Verify that the information being displayed is for the Sanction Type to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. TAB to the Violation Type section and enter a code number for the new Sanction Type.
10. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."

11. Click the OK button to successfully delete the Sanction Type.
12. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 48 – Maintain Sanction Types

Fields (Category section)

Code - The user-defined identification for the category of sanctions for the WIC program. This field is mandatory.
Description - The category description of sanctions for the WIC program. This field is mandatory.
Sanction Points - The number of points assessed to the Vendor as a result of a violation category. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Fields (Violations section)

Code - The user-defined identification for the sanction type. This field is mandatory.
Description - The description of the sanction type. This field is mandatory.
Months - The number of months that the sanction type will be in effect. This field is mandatory.
Effective Date – The date the violation becomes effective. This field is mandatory, but is not modifiable.
End Date – The date the violation is no longer effective. This field is mandatory, and is modifiable.
Comment - The user may provide any comments or remarks. This field is optional.

Maintain Violation Actions

To Maintain Violation Actions:

1. Click Tables on the Vendor Management main menu.
2. Click on Sanction Codes.
3. Click Violation Actions as shown below:

The Maintain Violation Actions window is displayed:

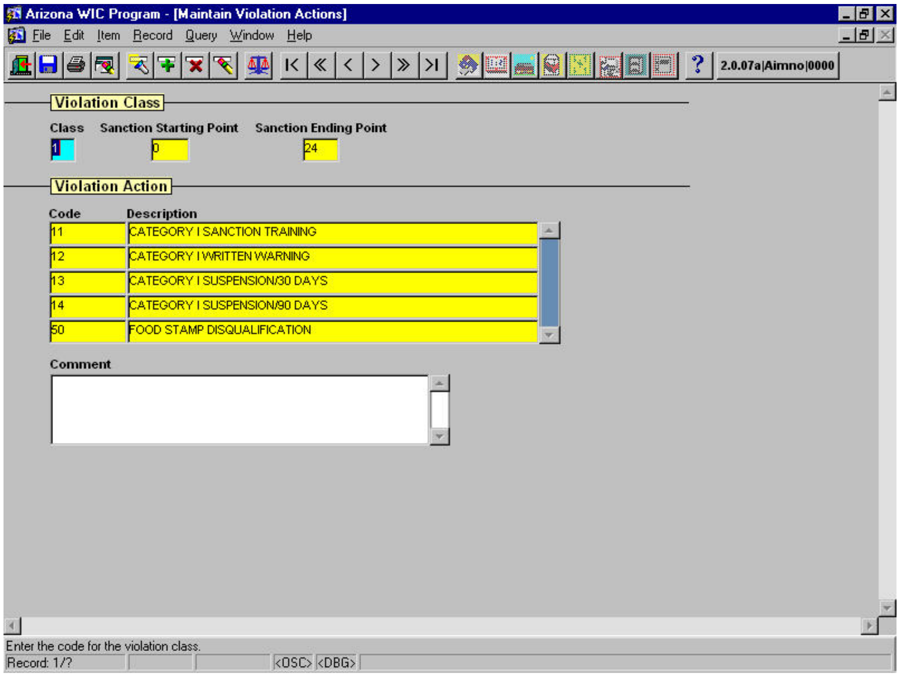


Figure 49 – Maintain Violation Actions

Add Violation Actions

1. The system defaults the user to highlight the class number under the violation class heading. Enter an ID number to identify the field violation class.
2. TAB to the starting point field and enter the starting number of points for the class.
3. TAB to the Ending point field and enter the ending number of points for the class.
4. TAB to the code number under the first entry in the Code field. The System also displays the Description and any existing Comments for that Violation Action.
5. Click the Insert Record icon on the toolbar. The System creates a blank line under the Code and Description fields for you to add a new Violation Action.
6. In the Code field, enter a number for the new Violation Action to be added. If the code you choose is already in use for another Violation Action, the System displays a pop-up window indicating: "Row already exists with same Code." Click the OK button, delete the Code number inserted, and enter a different number.
7. TAB to the Description field and enter the description of the new Violation Action.
8. TAB to the Comment field and enter any applicable comments.
9. TAB to the Violation Action section and enter a code number for the new Violation Action.
10. Click the Save icon.
11. The system displays a pop-up window indicating: "Transaction completed."
12. Click the OK button.

Update a Violation Action

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Violation Action being updated.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Violation Action.
7. Update the Violation Action as needed. (*Note: The System will not allow updates to the Code itself. If attempted, the system will indicate: "Field is protected against update.")*
8. TAB to the Violation Action section and enter a code number for the new Violation Action.
9. Click the Save icon. The System displays a pop-up window indicating: "Transaction completed."
10. Click the OK button.

Delete a Violation Action

1. Press the F7 key or click the Query icon.
2. The System automatically clears all of the fields.
3. The cursor moves to the first blank under the Code fields.
4. In the appropriate field, enter either the Code or the Description of the Violation Action being deleted.
5. Press the F8 key or the Query icon to execute the query.
6. The System displays any known data corresponding to this Violation Action.
7. Verify that the information being displayed is for the Violation Action to be deleted.
8. Click the Remove Record icon. The System deletes the record from the window, leaving the fields blank.
9. TAB to the Violation Action section and enter a code number for the new Violation Action.
10. Click the Save icon. The system displays a pop-up window indicating: "Transaction completed."
11. Click the OK button to successfully delete the Violation Action.

12. To verify that the deletion has worked successfully, repeat steps 1-5 above. If the deletion was successful, after pressing the F8 key, the system displays the following error message in a pop-up window: “Query caused no records to be retrieved. Re-enter.”

Figure 49 – Maintain Violation Actions

Field (Violation Class section)

Class - The user-defined identification for the violation class. This field is mandatory.
Starting Point - The ‘from’ point level for the violation class. This field is mandatory.
Ending Point - The ‘to’ point level for the violation class. This field is mandatory.

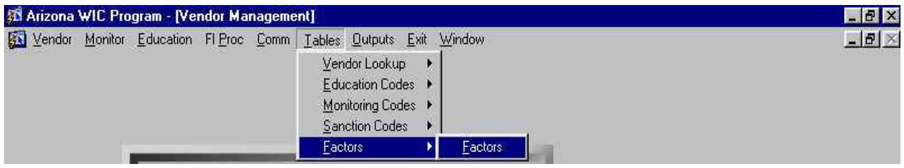
Field (Violation Action section)

Code - The identification code of the violation. This field is mandatory.
Description - The description of the action taken as a result of the violation. This field is mandatory.
Comment - The user may enter a comment or note about the action. This field is optional.

Maintain Factors

To Maintain Factors:

1. Click Tables on the Vendor Management main menu.
2. Click on Factors.
3. Click Factors as shown below:



The Maintain Factors window is displayed:

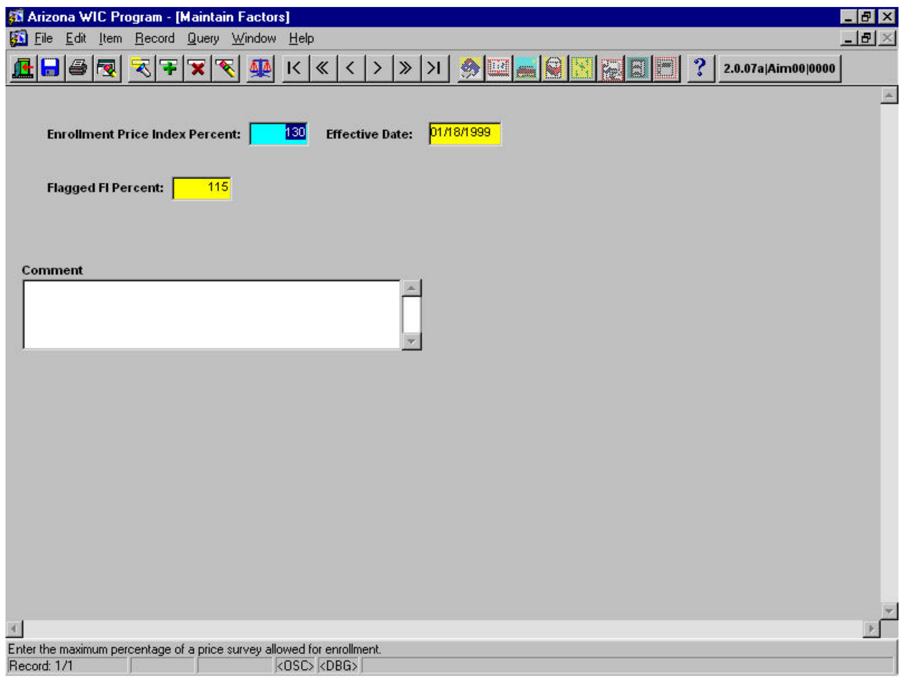


Figure 50 – Maintain Factors

1. TAB to the Enrollment Price Index percent field and enter the EPI percent for the vendor. This field is mandatory.
2. TAB to the Date changed field and enter the date the API last changed. This field is mandatory if EPI % is entered.
3. TAB to the Flagged FI Percent field and enter the correct amount. This field is mandatory.
4. TAB to the Comments field and enter any appropriate comments. This field is optional.

Figure 50 – Maintain Factors

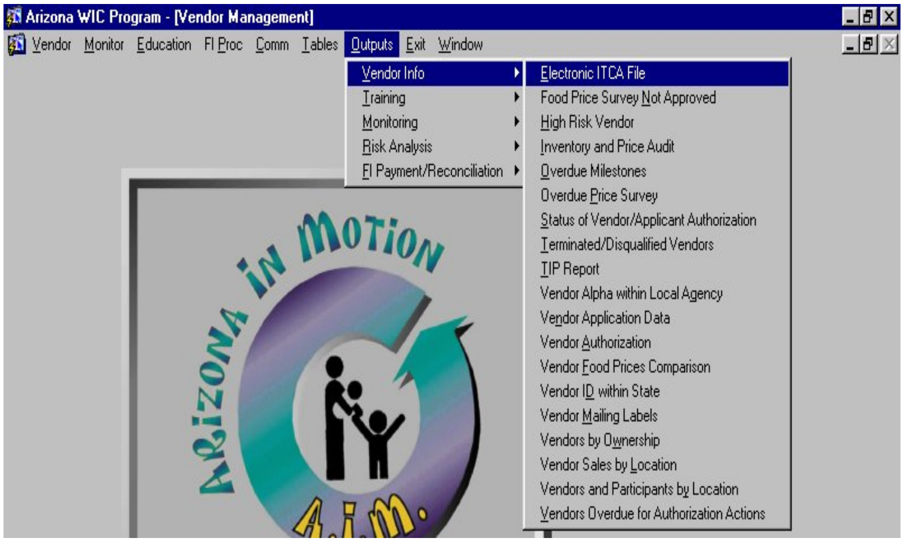
Fields

Enrollment Price Index Percent - The percent of the Local Agency's average price survey for a food package, past which a Vendor will not be accepted as a WIC Vendor. This factor is used on the Enrollment Price Index windows. This field is mandatory.
Date Changed - The date on which the Enrollment Price Index Percent was last changed. This field is mandatory if the Enrollment Price Index Percent is entered.
Flagged FI Percent - The percent of the state-wide average redeemed amount for a FI, past which a FI is determined to be flagged. This field is mandatory.
Comment - The user may enter a comment or note about the action. This field is optional.

Producing an Electronic ITCA File Report

To Produce an Electronic ITCA File Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click Electronic ITCA File as shown below:



The Electronic ITCA File runtime parameter window is displayed:

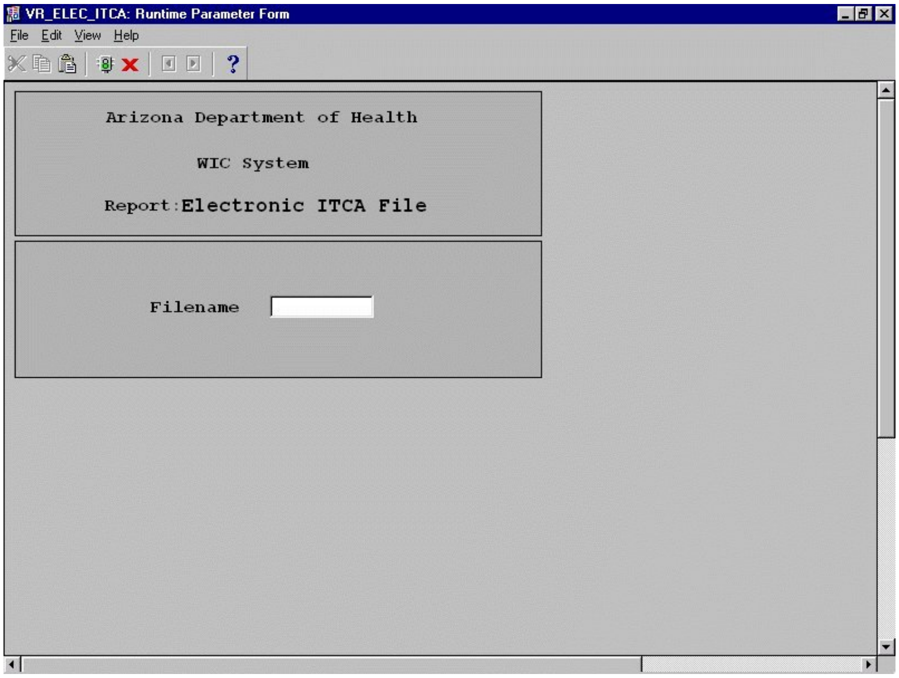


Figure 51 - Electronic ITCA File

Creating an Electronic ITCA File report

1. Enter the directory and filename of the ITCA file you are about to generate. If this is being run for the first time then a path and filename must be chosen.
2. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

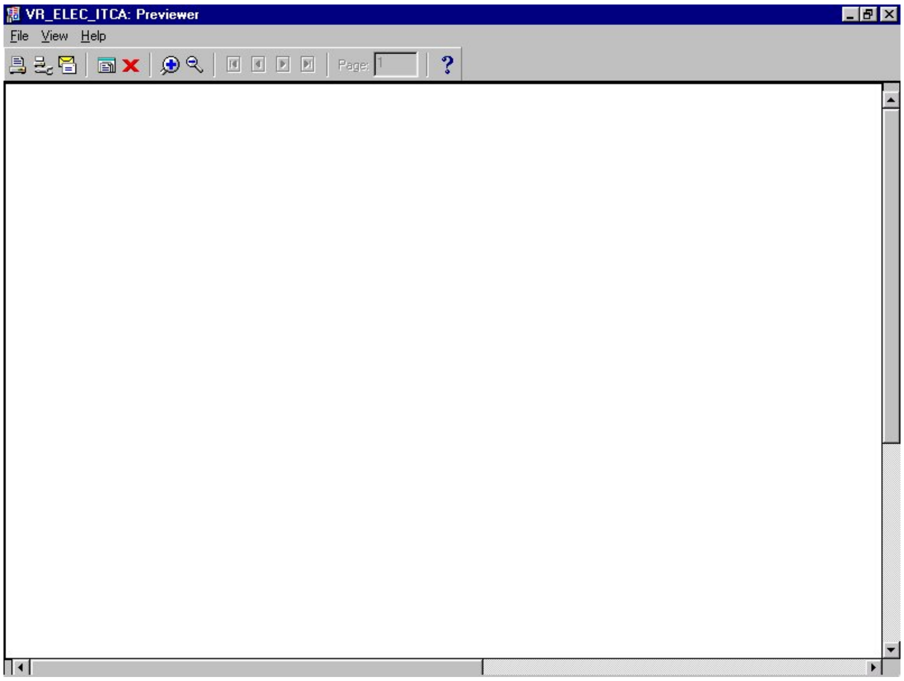


Figure 52 - Sample Electronic ITCA File Report

Figure 51 - Electronic ITCA File

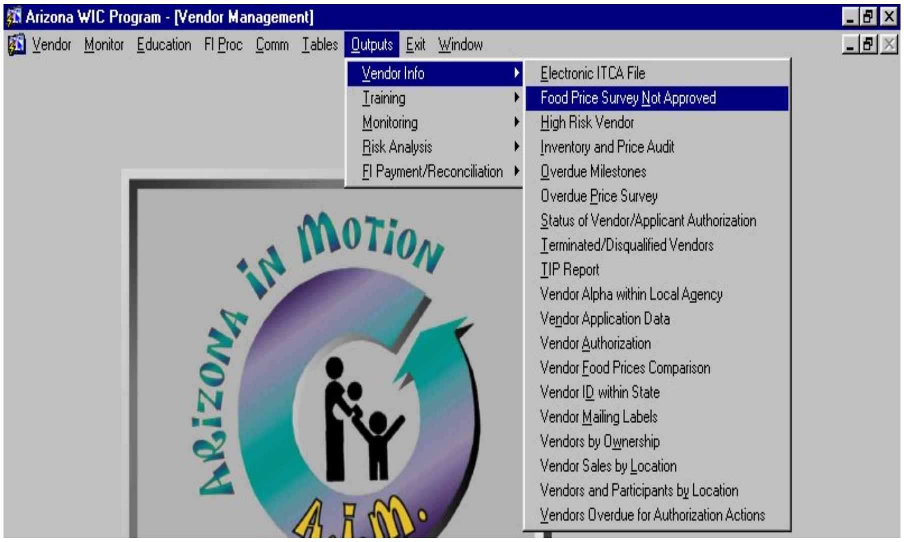
Fields

Filename - The directory and filename for the generated ITCA file.

Producing a Food Price Survey Not Approved Report

To Produce a Food Price Survey Not Approved Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Food Price Survey Not Approved as shown below:



The Food Price Survey Not Approved parameter window is displayed:

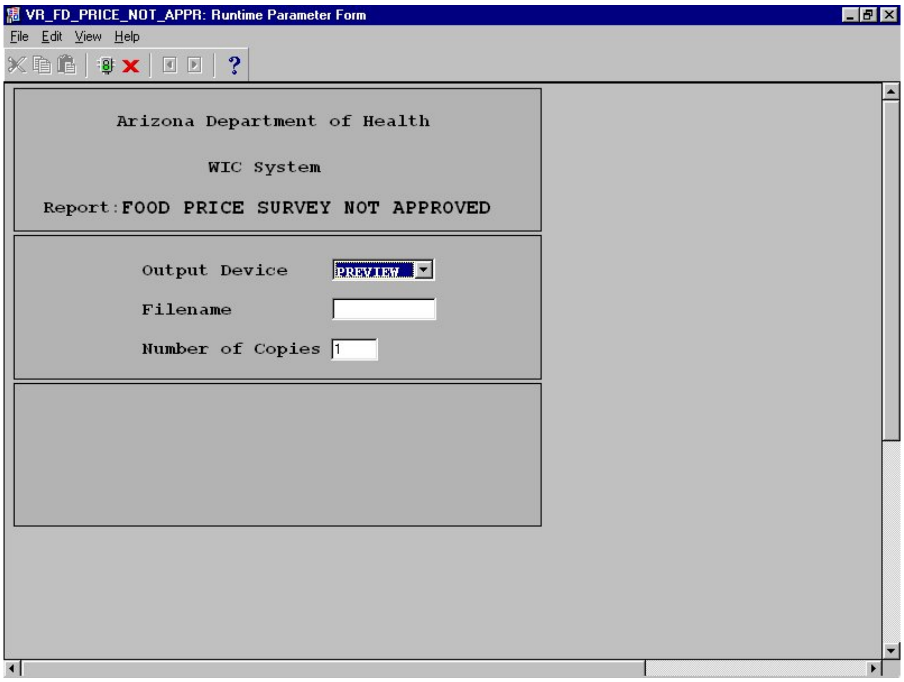
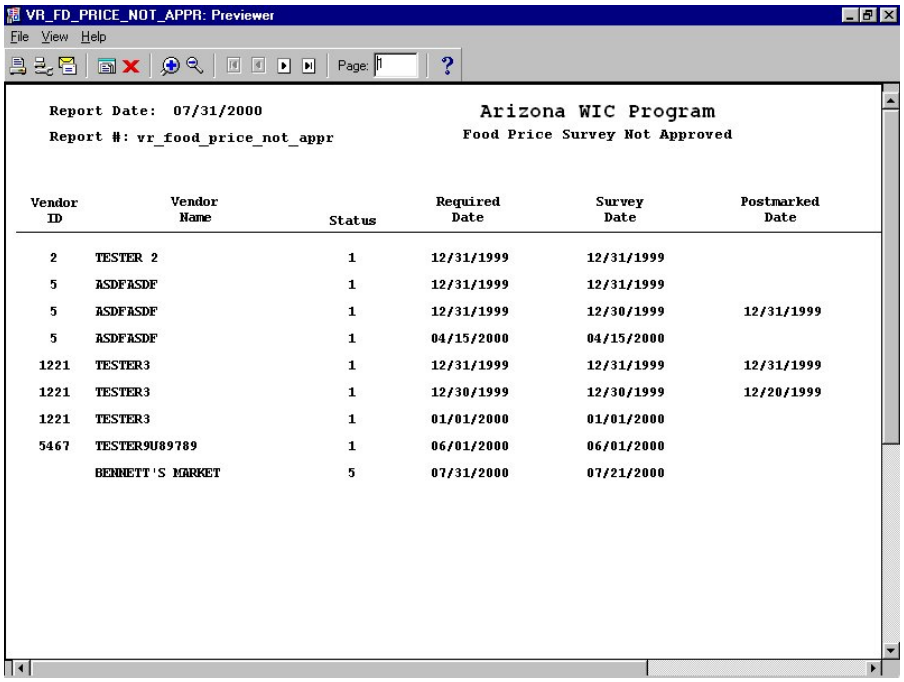


Figure 53 - Food Price Survey Not Approved

Creating a Food Price Survey Not Approved Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.


VR_FD_PRICE_NOT_APPR: Previewer

File View Help

Page: 1

Report Date: 07/31/2000

Report #: vr_food_price_not_appr

Arizona WIC Program

Food Price Survey Not Approved

Vendor ID	Vendor Name	Status	Required Date	Survey Date	Postmarked Date
2	TESTER 2	1	12/31/1999	12/31/1999	
5	ASDFASDF	1	12/31/1999	12/31/1999	
5	ASDFASDF	1	12/31/1999	12/30/1999	12/31/1999
5	ASDFASDF	1	04/15/2000	04/15/2000	
1221	TESTER3	1	12/31/1999	12/31/1999	12/31/1999
1221	TESTER3	1	12/30/1999	12/30/1999	12/20/1999
1221	TESTER3	1	01/01/2000	01/01/2000	
5467	TESTER9U89789	1	06/01/2000	06/01/2000	
	BENNETT'S MARKET	5	07/31/2000	07/21/2000	

Figure 54 - Sample of Food Price Survey Not Approved Report

Figure 53 **-** *Food Price Survey Not Approved*

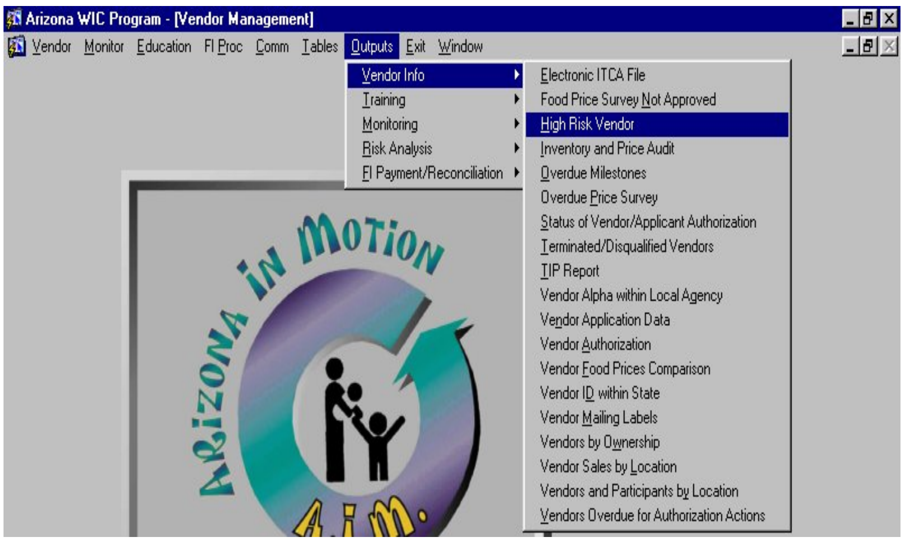
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a High Risk Vendor Report

To Produce a High Risk Vendor Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on High Risk Vendor as shown below:



The High Risk Vendor parameter window is displayed:

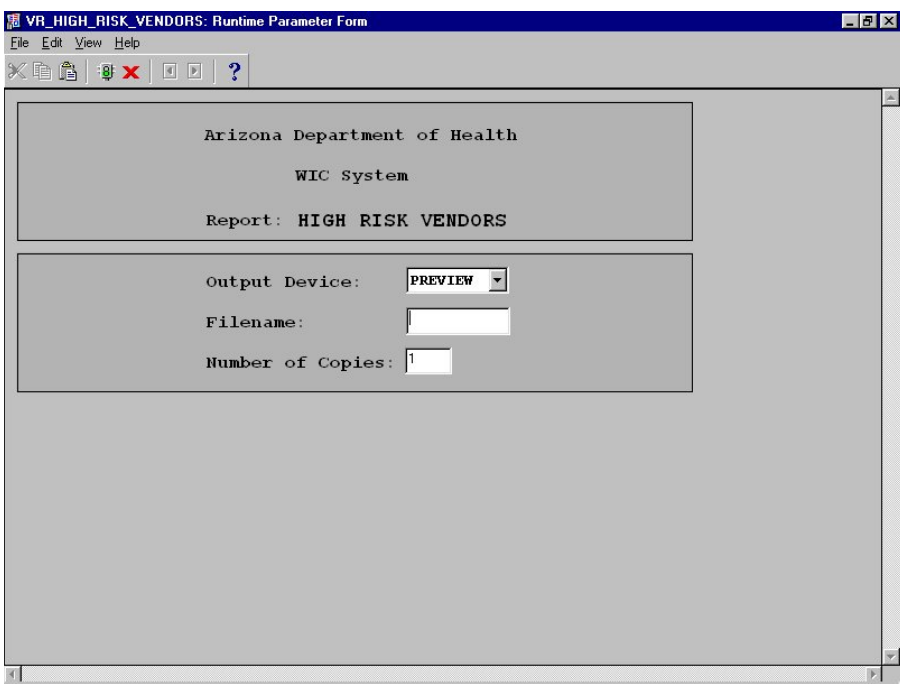


Figure 55 - The High Risk Vendor

Creating a High Risk Vendor Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

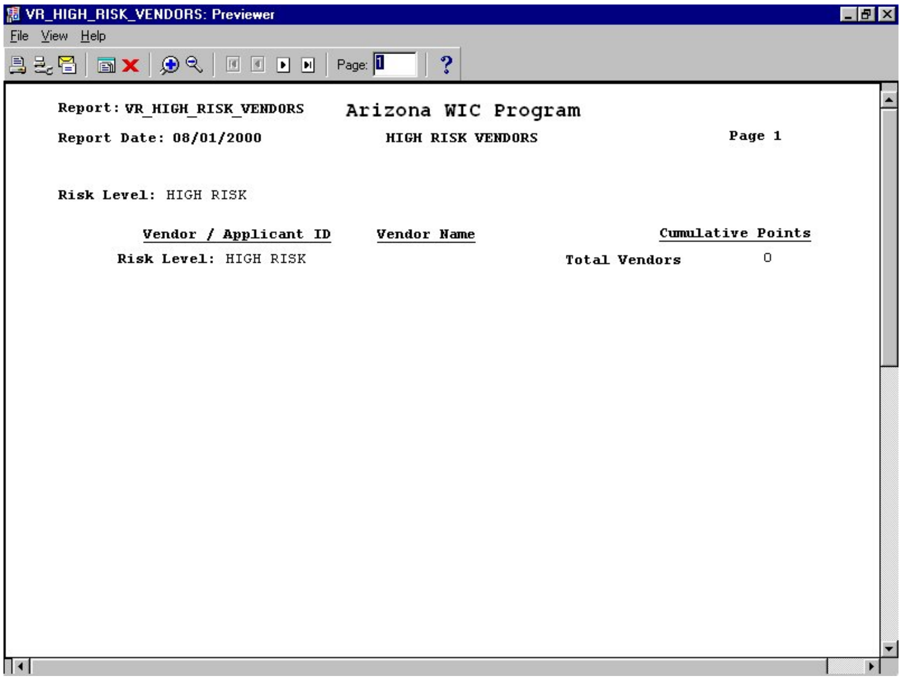


Figure 56 - Sample of High Risk Vendor Report

Figure 55 - The High Risk Vendor

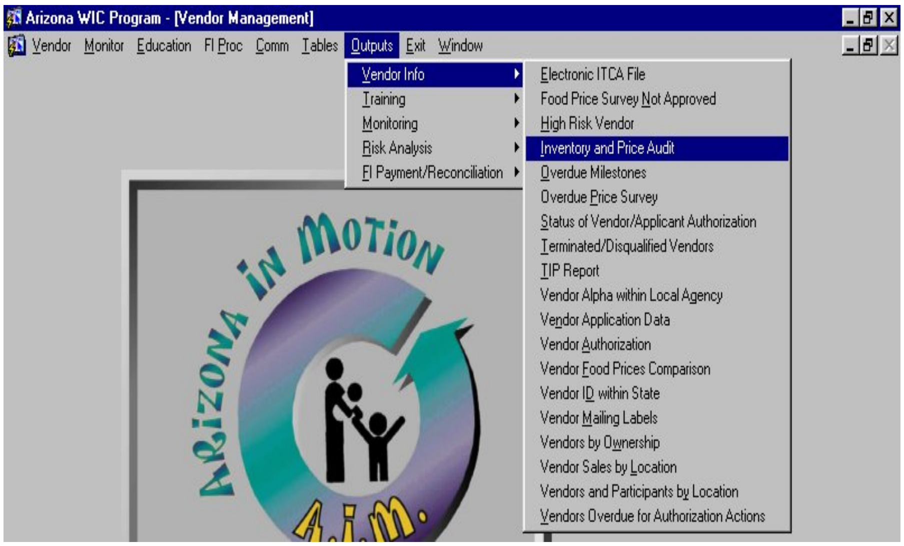
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing an Inventory and Price Audit Report

To Produce an Inventory and Price Audit Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Inventory and Price Audit as shown below:



The Inventory and Price Audit parameter window is displayed:

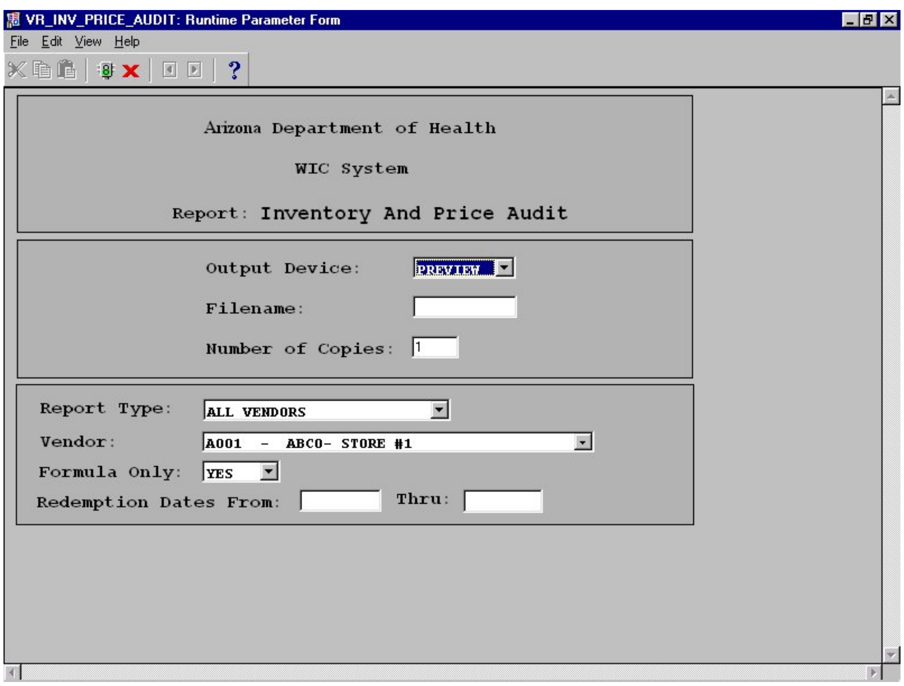


Figure 57 - Inventory and Price Audits

Creating a Inventory and Price Audits Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Then select the report type by using the arrow to the right of the field. If single vendor is chosen then use the following field to select a vendor.
5. Choose yes or no for the formula only field and then enter a redemption date from and through.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

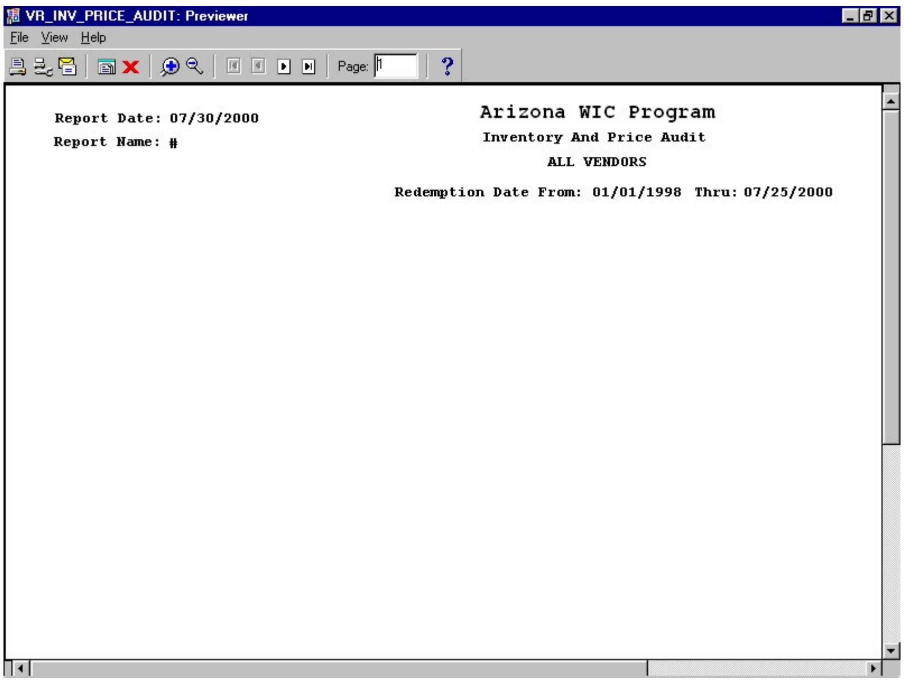


Figure 58 - Sample of Inventory and Price Audits Report

Figure 57 - Inventory and Price Audits

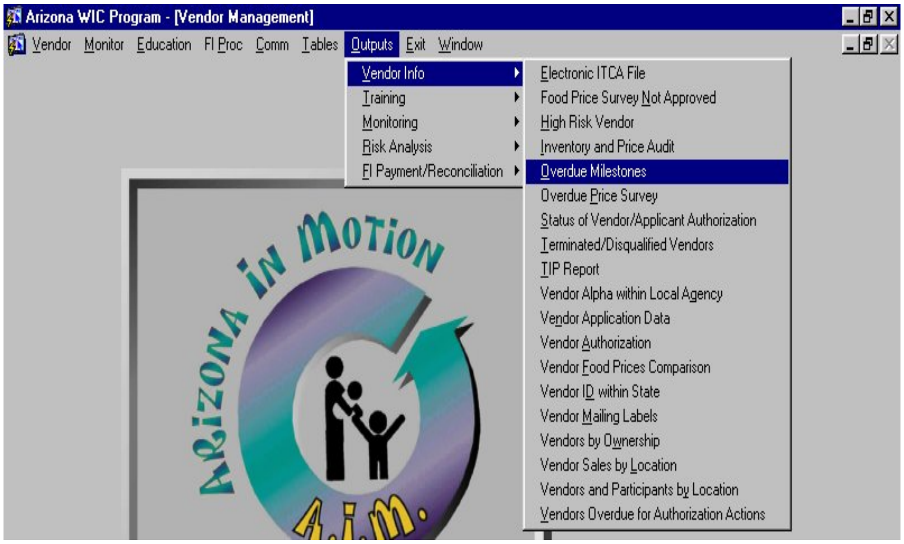
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select all Vendors or a subset of Vendors: all or one Vendor.
Vendor - The user may select the Vendor to be queried on from the list of values.
Formula Only - The user may select all FI's or just those with infant formula.
Redemption Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing an Overdue Milestones Report

To Produce an Overdue Milestones Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info
3. Click on Overdue Milestones as shown below:



The Overdue Milestones parameter window is displayed:

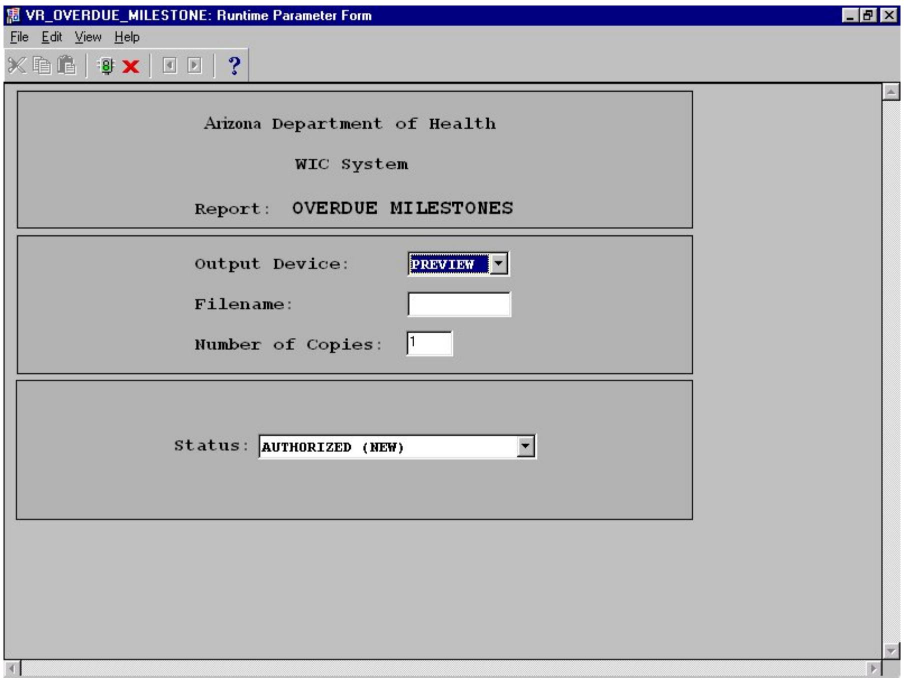


Figure 59 - Overdue Milestones

Creating a Overdue Milestones Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the status of the Vendor from the drop down on the right.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

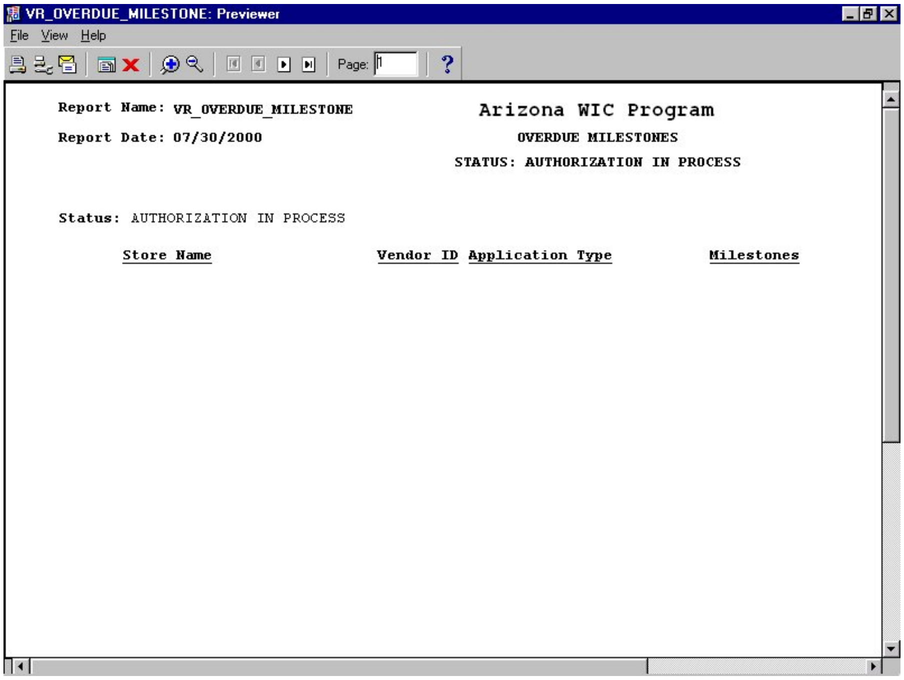


Figure 60 - Sample of Overdue Milestones Report

Figure 59 - Overdue Milestones

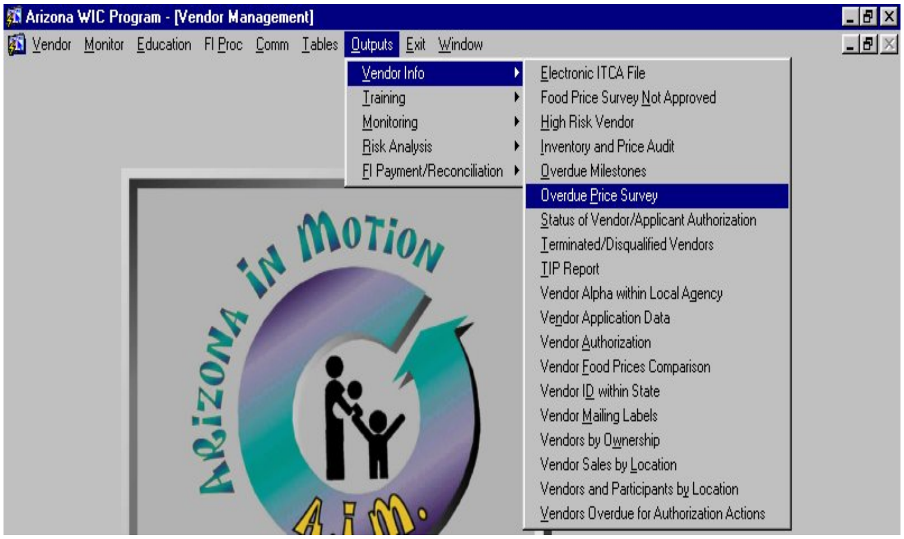
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Status - The particular Vendor status to report on.

Producing an Overdue Price Survey Report

To Produce an Overdue Price Survey Report

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Overdue Price Survey as shown below:



The Overdue Price Survey parameter window is displayed:

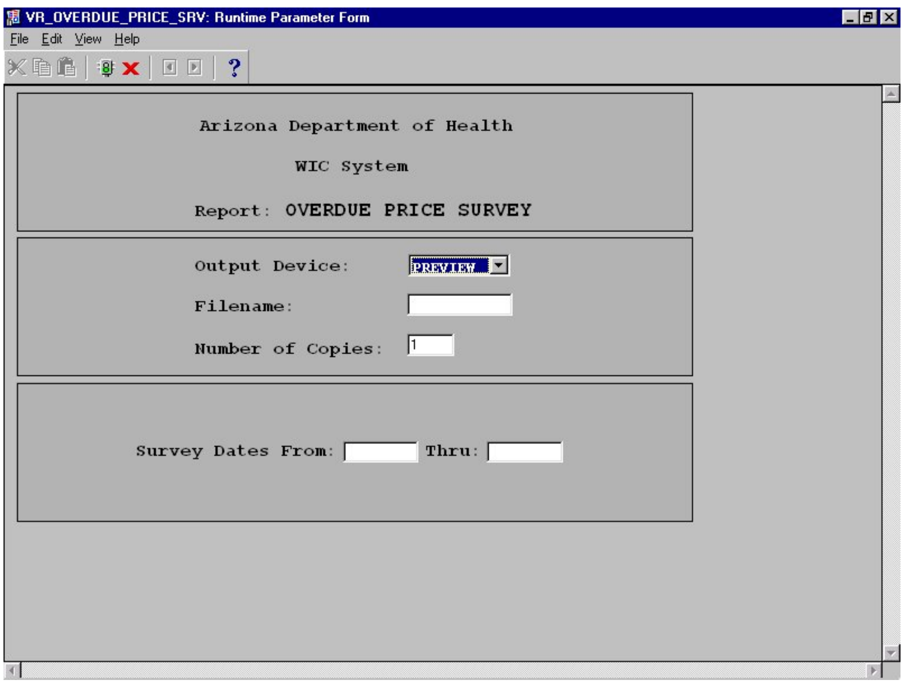


Figure 61 - Overdue Price Survey

Creating a Overdue Price Survey Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

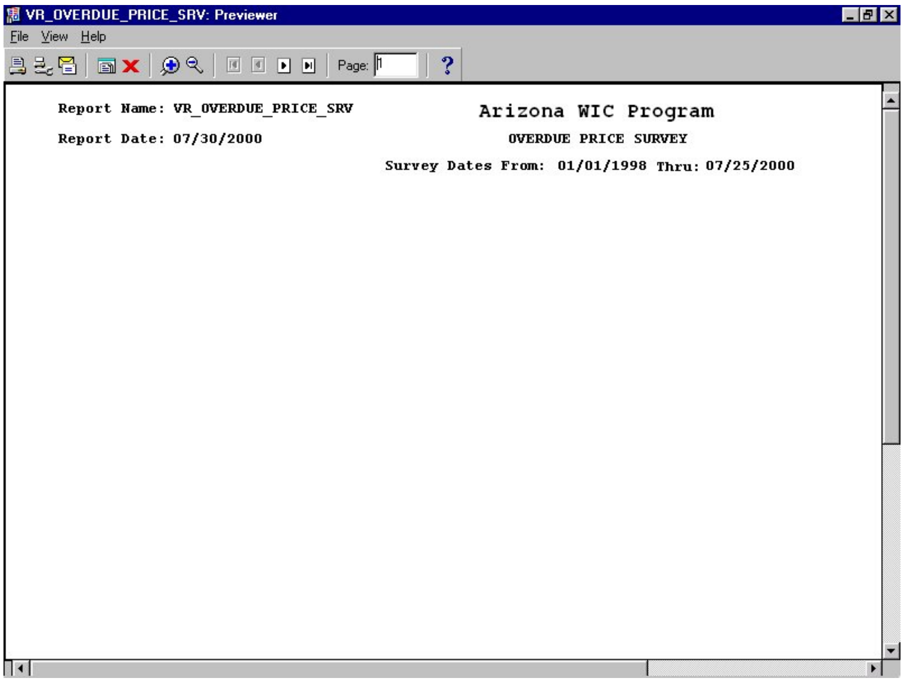


Figure 62 - Sample of Overdue Price Survey Report

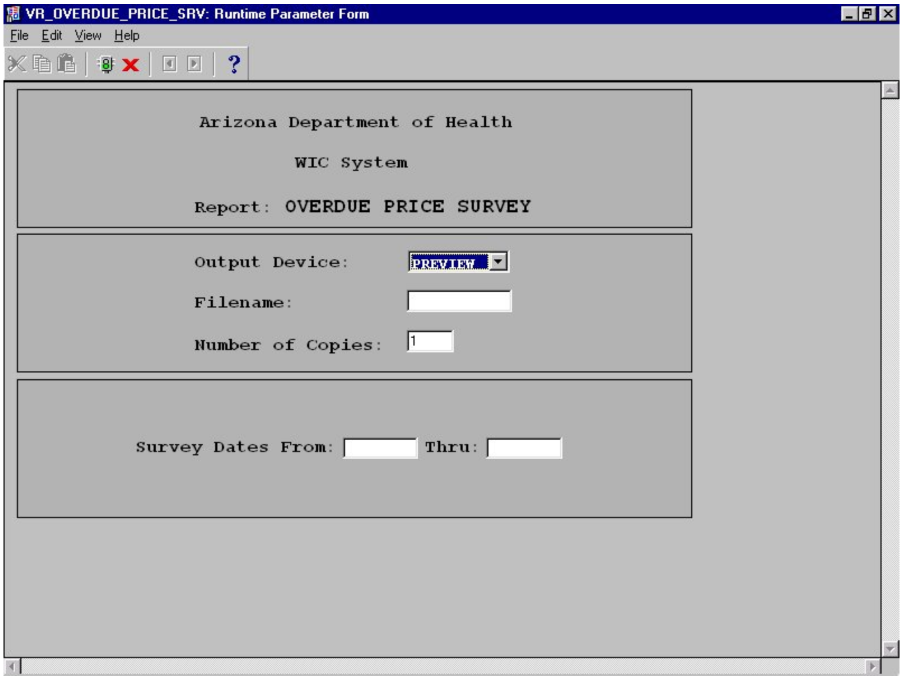


Figure 61 - Overdue Price Survey

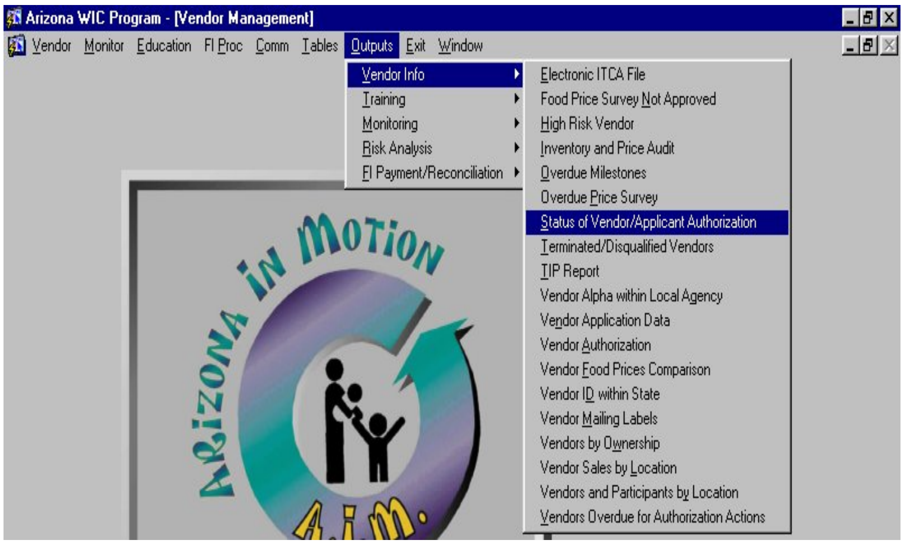
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Survey Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Status of Vendor/Applicant Authorization Report

To Produce a Status of Vendor/Applicant Authorization Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Status of Vendor/Applicant Authorization as shown below:



The Status of Vendor/Applicant Authorization parameter window is displayed:

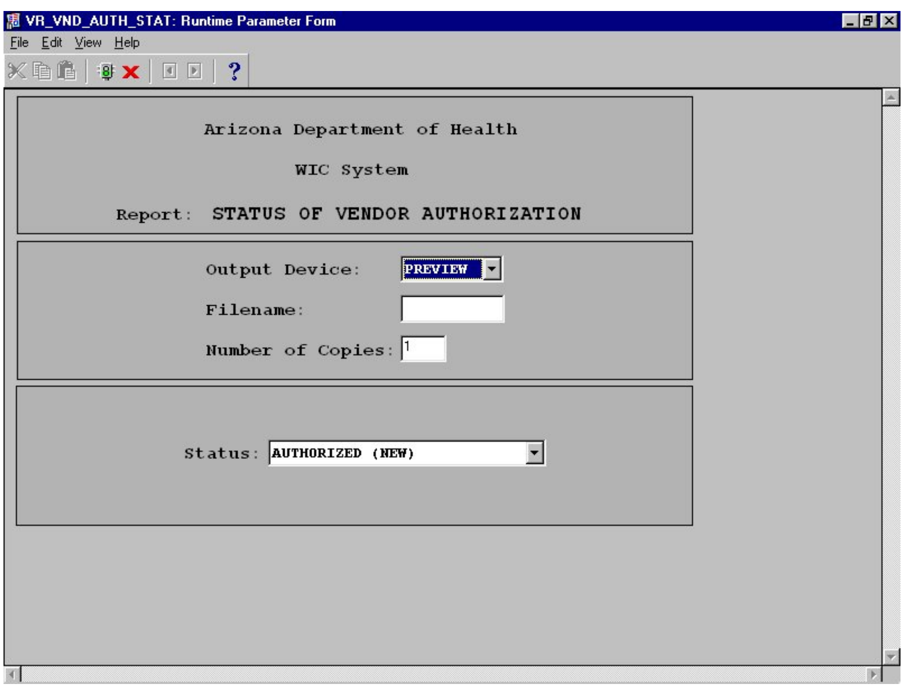


Figure 63 - Status of Vendor/Applicant Authorization Criteria

Creating a Status of Vendor/Applicant Authorization Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Choose the status of the vendor's approval using the drop down arrow to the right of the field.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

Figure 64 - Sample of Status of Vendor/Applicant Authorization Report

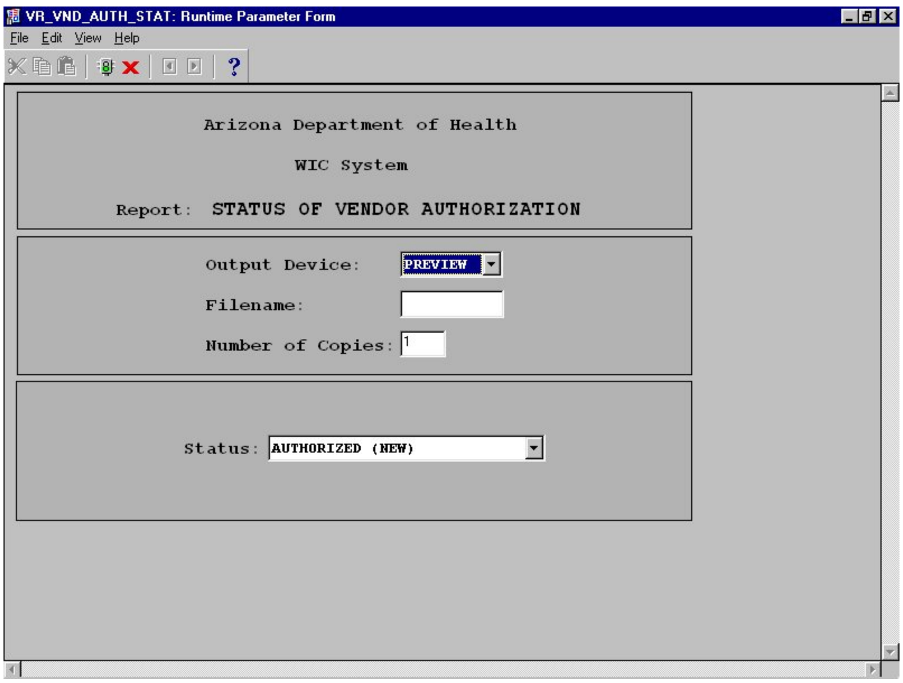


Figure 63 - Status of Vendor/Applicant Authorization Criteria

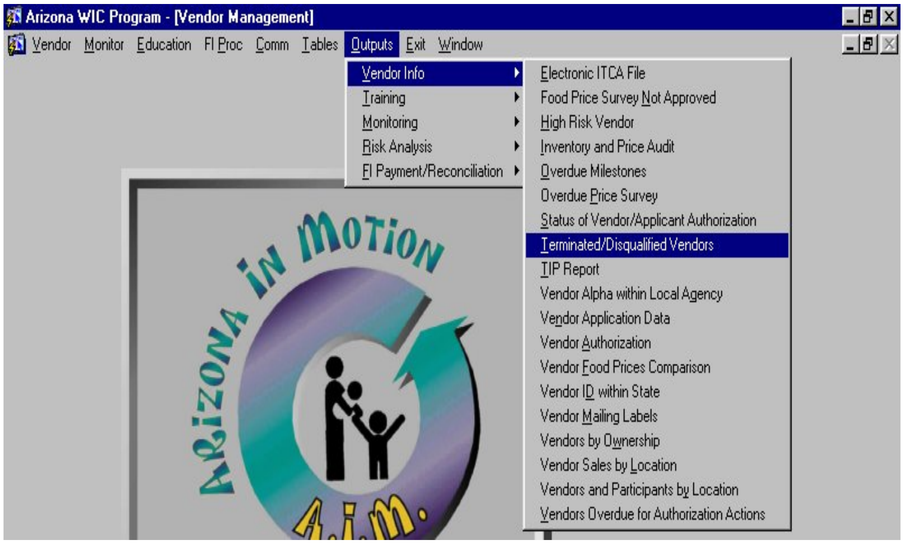
Fields

Status - The particular Vendor status to report on.
Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a Terminated/Disqualified Report

To Produce a Terminated/Disqualified Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Terminated/Disqualified Vendors as shown below:



The Terminated/Disqualified Vendors parameter window is displayed:

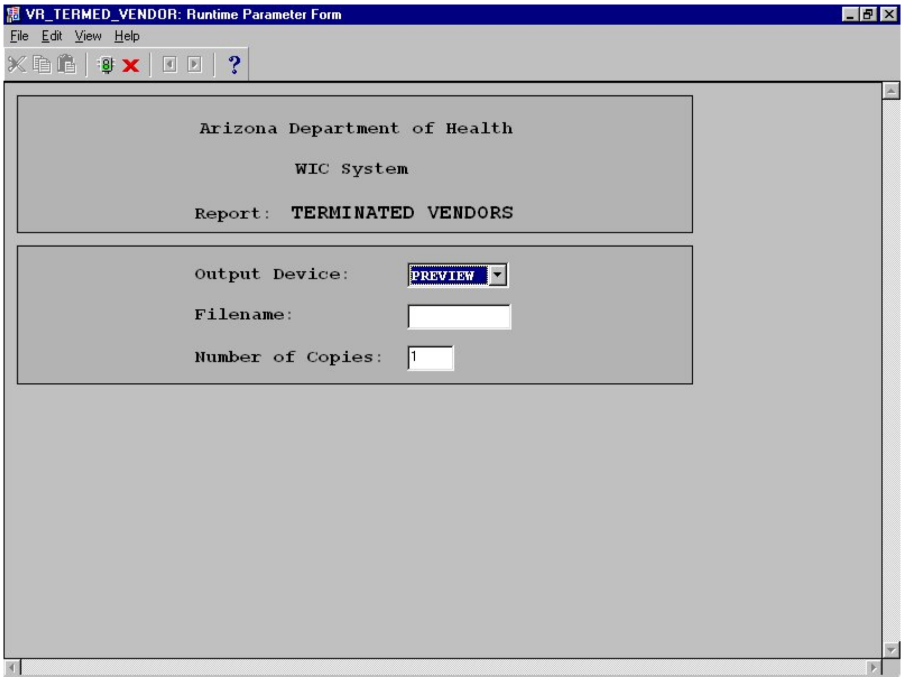


Figure 65 - Terminated/Disqualified Vendors

Creating a Terminated/Disqualified Vendors Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

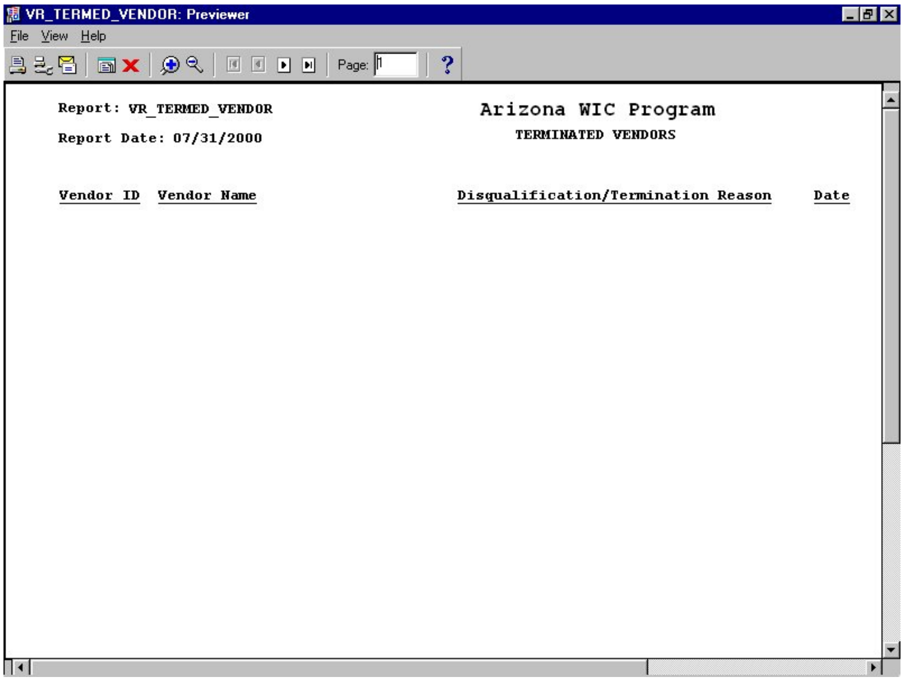


Figure 66 - Sample of Terminated/Disqualified Vendors Report

Figure 65 - Terminated/Disqualified Vendors

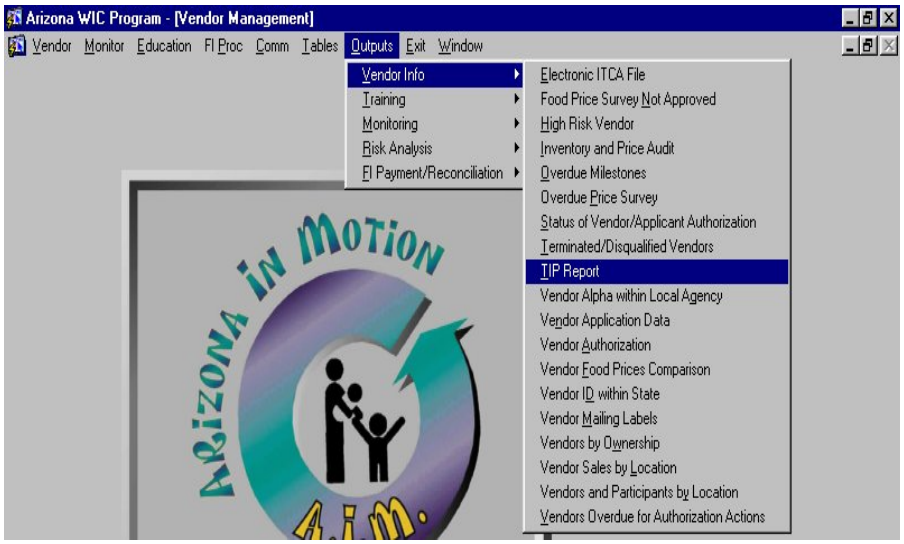
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a TIP Report

To Produce a TIP Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on TIP Report as shown below:



The TIP Report parameter window is displayed:

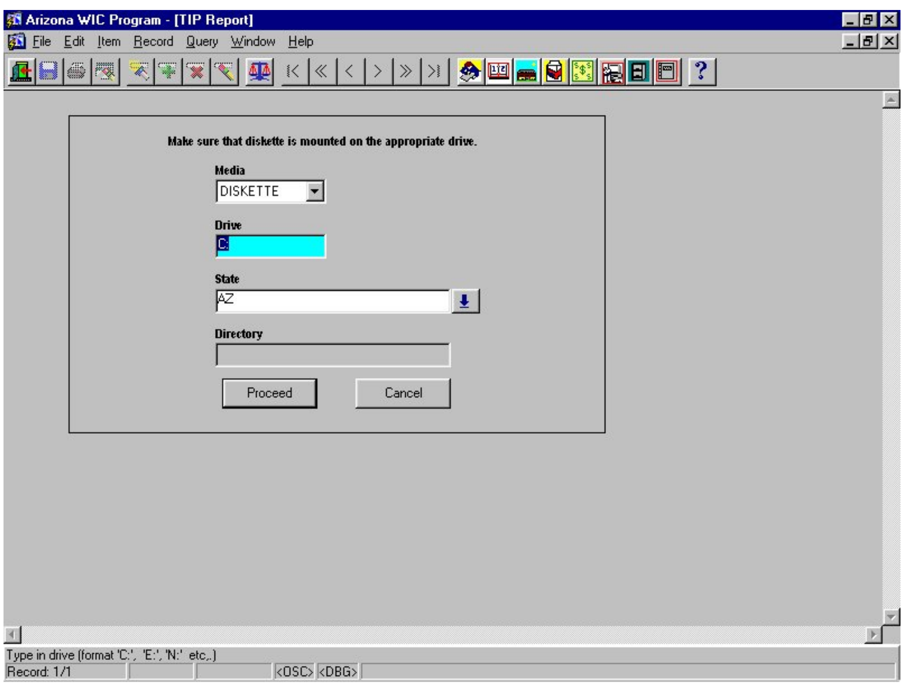
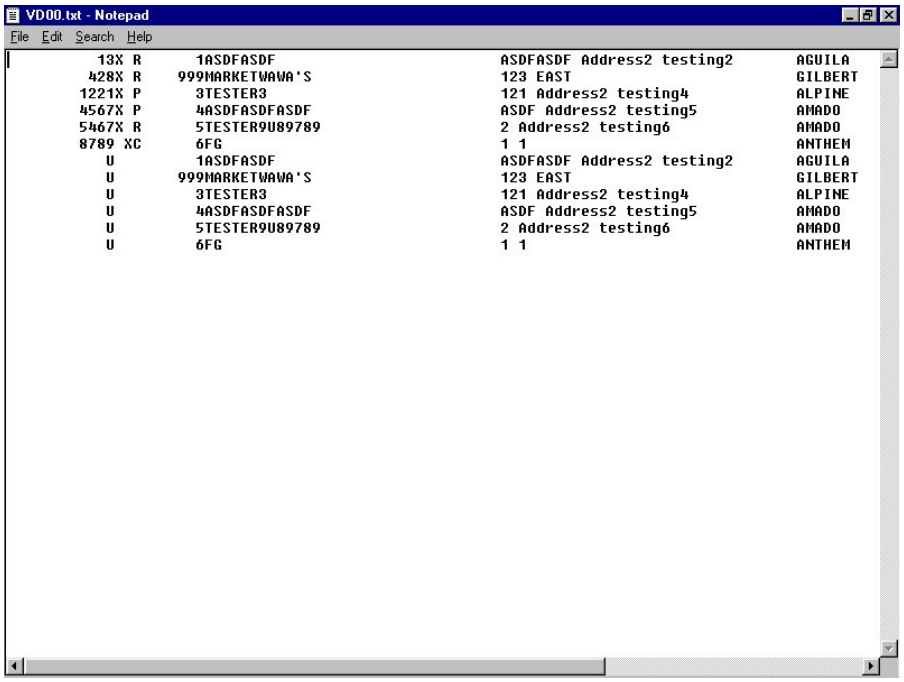


Figure 67 - TIP Report Criteria

Creating a TIP Report

1. Click the arrow to the right of the Media field to show a list of valid values and select the type of environment the data will be stored in.
2. Select the drive in which this data will be transferred to.
3. Use the drop down list and select the actual directory in which this data will be stored and finally
4. Click the proceed button to run the report.




```
   13X R     1ASDFASDF            ASDFASDF Address2 testing2    AGUILA
  428X R   999MARKETWAWA'S        123 EAST                      GILBERT
 1221X P     3TESTER3             121 Address2 testing4         ALPINE
 4567X P     4ASDFASDFASDF        ASDF Address2 testing5        AMADO
 5467X R     5TESTER9U89789       2 Address2 testing6           AMADO
 8789 XC     6FG                  1 1                           ANTHEM
     U       1ASDFASDF            ASDFASDF Address2 testing2    AGUILA
     U     999MARKETWAWA'S        123 EAST                      GILBERT
     U       3TESTER3             121 Address2 testing4         ALPINE
     U       4ASDFASDFASDF        ASDF Address2 testing5        AMADO
     U       5TESTER9U89789       2 Address2 testing6           AMADO
     U       6FG                  1 1                           ANTHEM
```

Figure 68 - Sample of TIP Report

Figure 67 - TIP Report Criteria

Fields

Media - The media in which the data will be delivered: diskette, etc.
Drive - The computer drive to send the data file to.
Directory - The directory in which the file will be stored.

Push Buttons

Proceed –
Cancel -

Producing a Vendor Alpha within Local Agency Report (No longer in use by AZ 10/17/2005 – no access to report via AIM.)

To Produce a Vendor Alpha within Local Agency Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Vendor Alpha within Local Agency as shown below:

The Vendor Alpha within Local Agency parameter window is displayed:

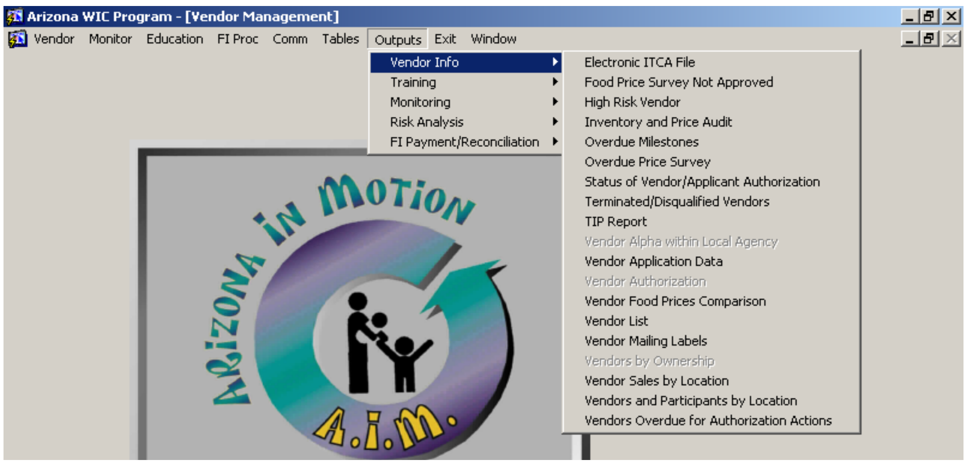


Figure 69 - Vendor Alpha within Local Agency

Creating a Vendor Alpha within Local Agency Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Use the drop down arrow to select the type of report (ie. State, local agency)
5. Now choose the Local Agency form the drop down list of choices.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

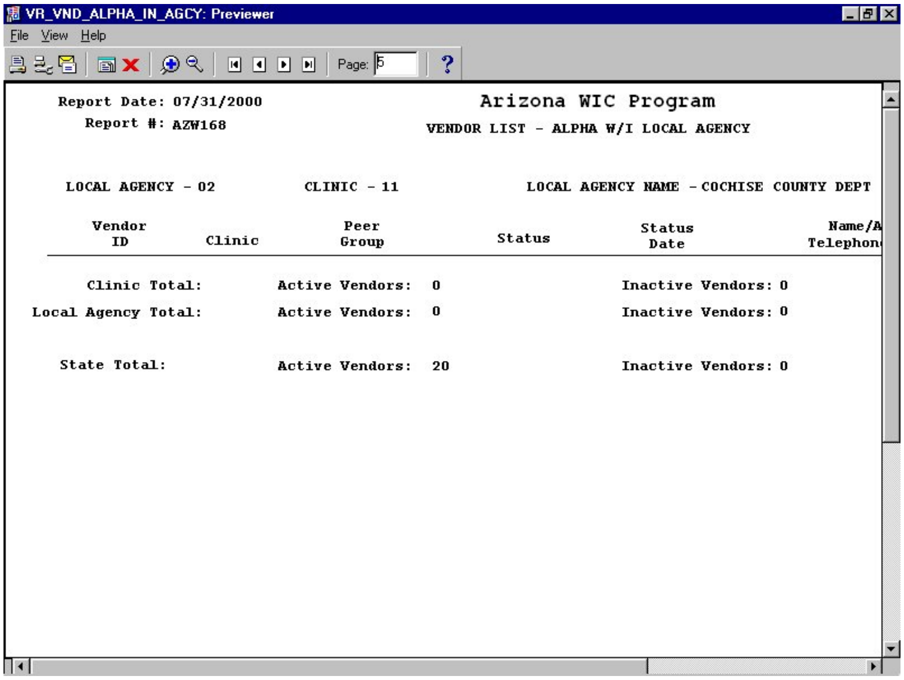


Figure 70 - Sample of Vendor Alpha within Local Agency Report

Figure 69 - Vendor Alpha within Local Agency

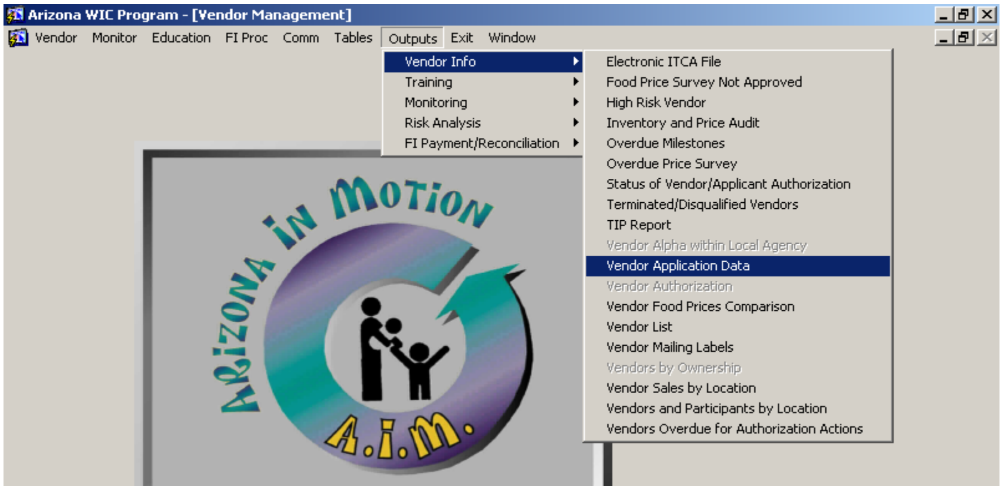
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select all Vendors or a subset of Vendors: all or Local Agency.
Local Agency - The user may select the Local Agency to be queried on from the list of values.

Producing a Vendor Application Data Report

To Produce a Vendor Application Data Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info
3. Click on Vendor Application Data as shown below:



The Vendor Application Data parameter window is displayed:

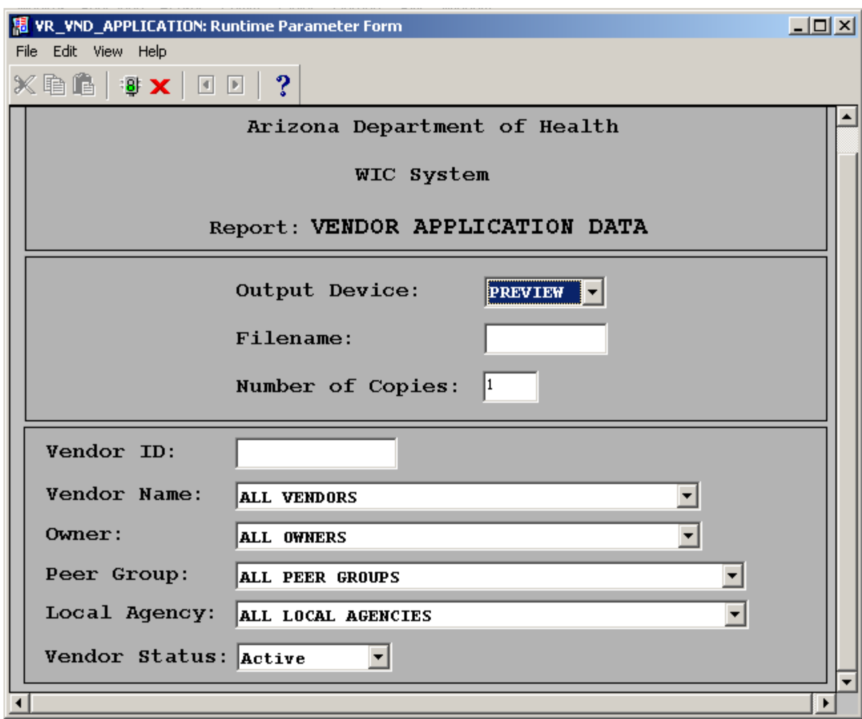


Figure 71 - Vendor Application Data

Creating a Vendor Application Data Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If available, enter the Vendor ID and run the report to retrieve a vendor application for a specific vendor.
5. Or, use the drop down arrow on the right side of Vendor Name to select the vendor or retain All Vendors to search all vendors.
6. If applicable, select an owner to report on, or retain the All Owners selection to search all owners.
7. Choose a peer group from the drop down list and then choose a Local Agency, or retain the All Peer Groups and All Local Agencies selection to search all for both options.
8. Choose to search either Active or Inactive status vendors. The field defaults to Active.
9. If Screen was selected as the Output Device, click the green light icon to bring up the preview screen shown below.

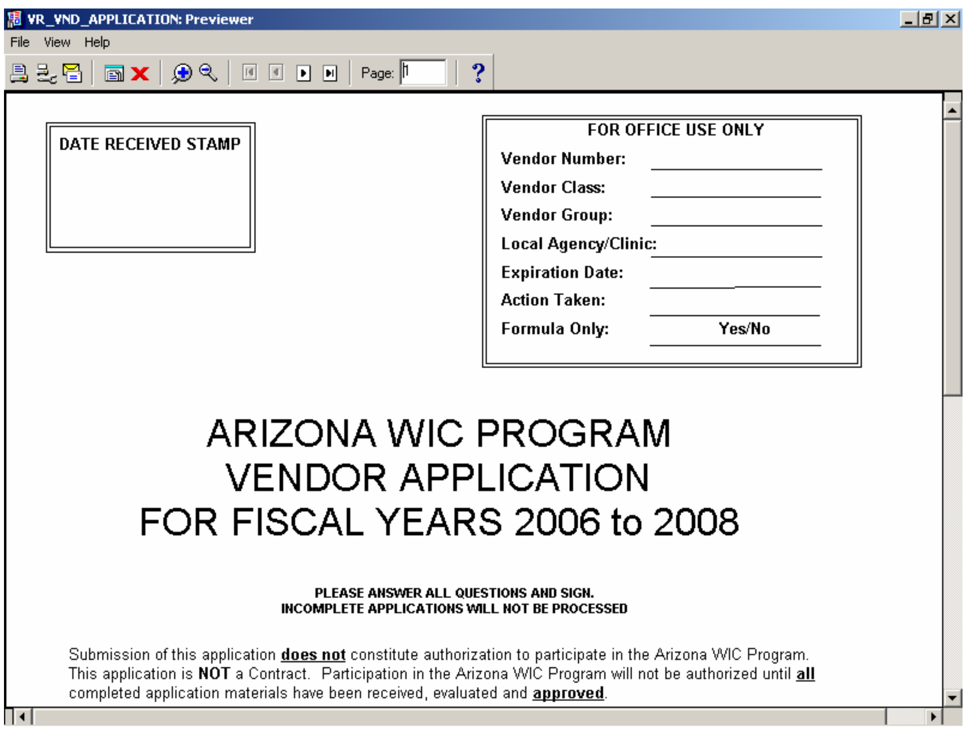


Figure 72 - Sample of Vendor Application Data Report

Figure 71 - Vendor Application Data

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Vendor ID – The user may enter the valid vendor id number to retrieve an application for a specific vendor.

Vendor Name - The user may select the Vendor to be queried on from the list of values.
Owner - The user may limit Vendors by selecting an Owner from a list of values.
Peer Group - The user may limit Vendors by selecting a Peer Group from a list of values.
Local Agency - The user may select a Local Agency to be queried on from the list of values.
Vendor Status - The user may select either Active or Inactive vendors to query on.

Producing a Vendor Authorization Report (No longer in use by AZ 10/17/2005 – no access to report via AIM.)

To Produce a Vendor Authorization Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info
3. Click on Vendor Authorization as shown below:

The Vendor Authorization parameter window is displayed:

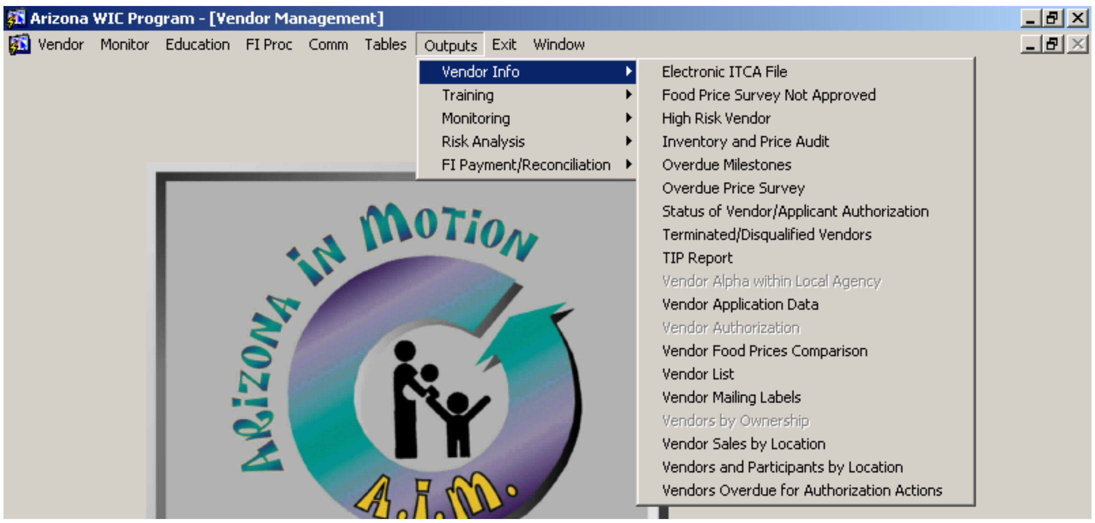


Figure 73 - Vendor Authorization Criteria

Creating a Vendor Authorization Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

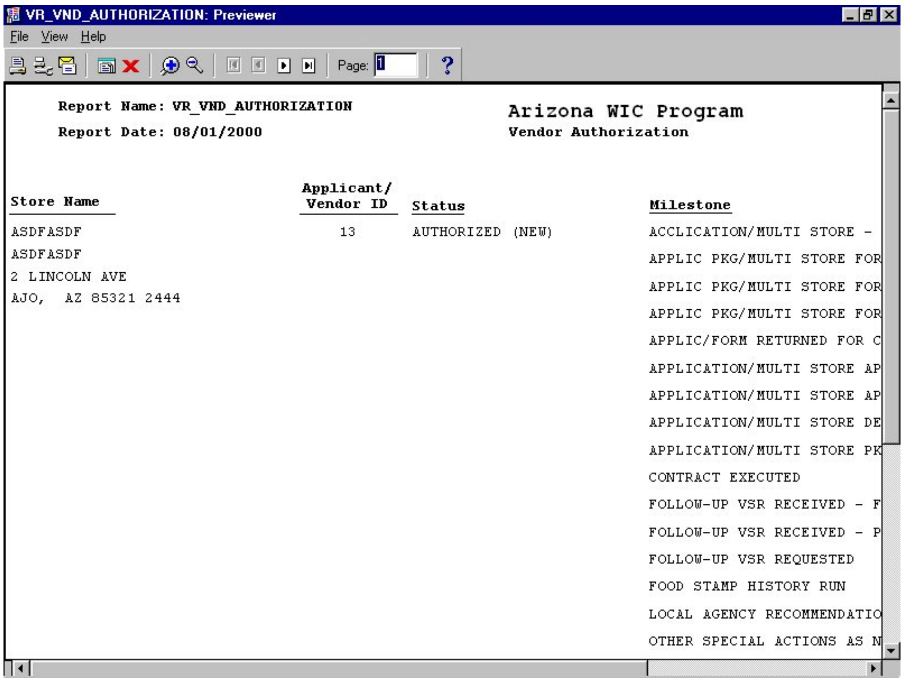


Figure 74 - Sample of Vendor Authorization Report

Figure 73 - Vendor Authorization Criteria

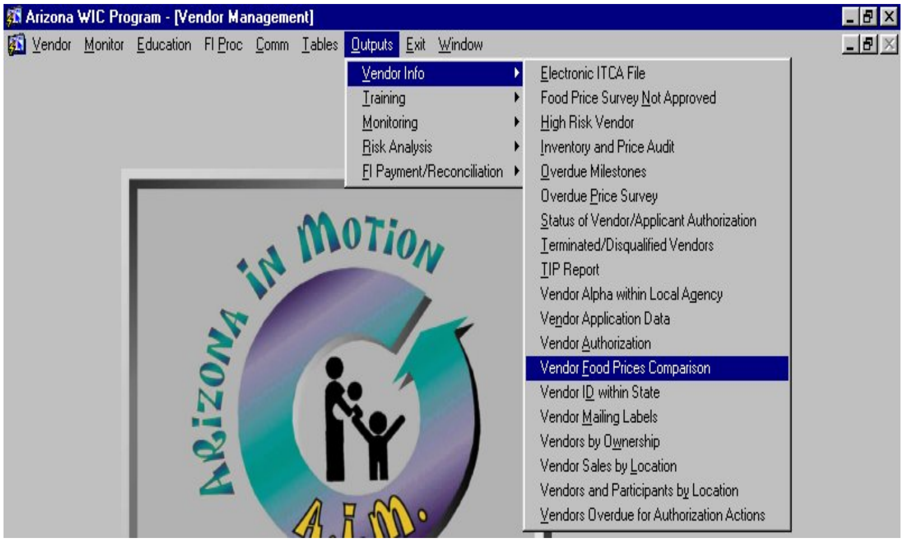
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a Vendor Food Prices Comparison Report

To Produce a Vendor Food Prices Comparison Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info
3. Click on Vendor Food Prices Comparison as shown below:



The Vendor Food Prices Comparison parameter window is displayed:

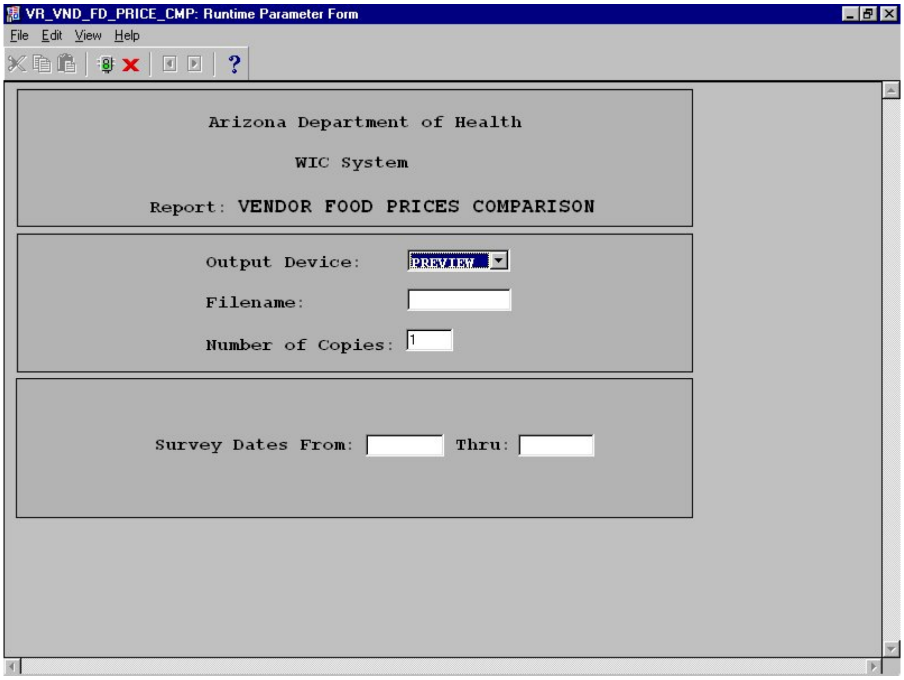


Figure 75 - Vendor Food Prices Comparison

Creating a Vendor Food Prices Comparison Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Move to the survey dates from and thru fields and enter the dates in their corresponding spaces.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

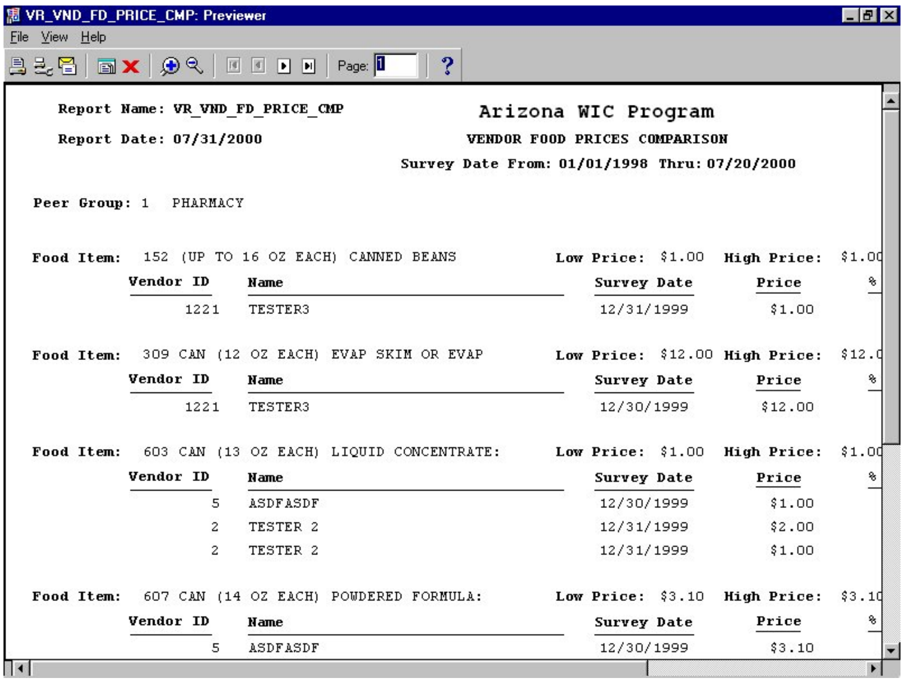


Figure 76 - Sample of Vendor Food Prices Comparison Report

Figure 75 - Vendor Food Prices Comparison

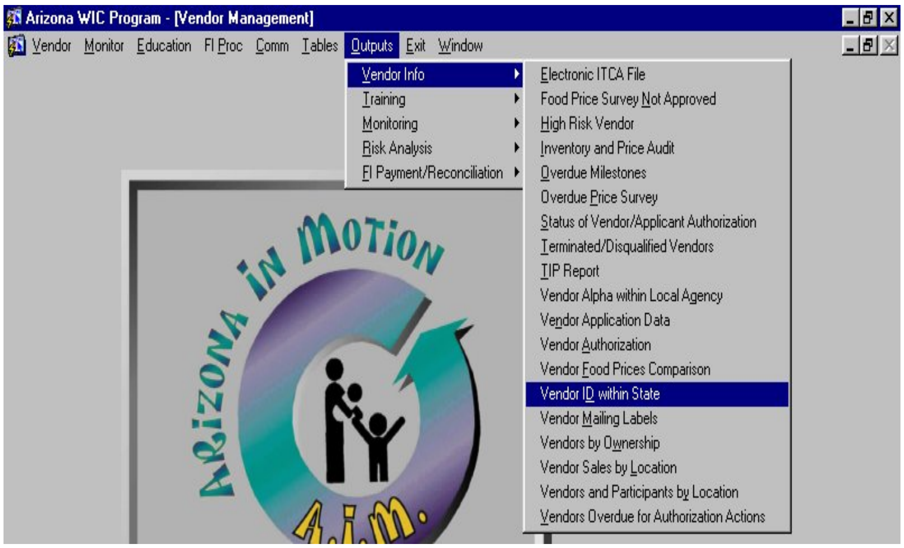
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Survey Date From – The first date in which the report is run for.
Thru – The final date in which the report is run for.

Producing a Vendor ID within State Report

To Produce a Vendor ID within State Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Vendor ID within State as shown below:



The Vendor ID within State parameter window is displayed:

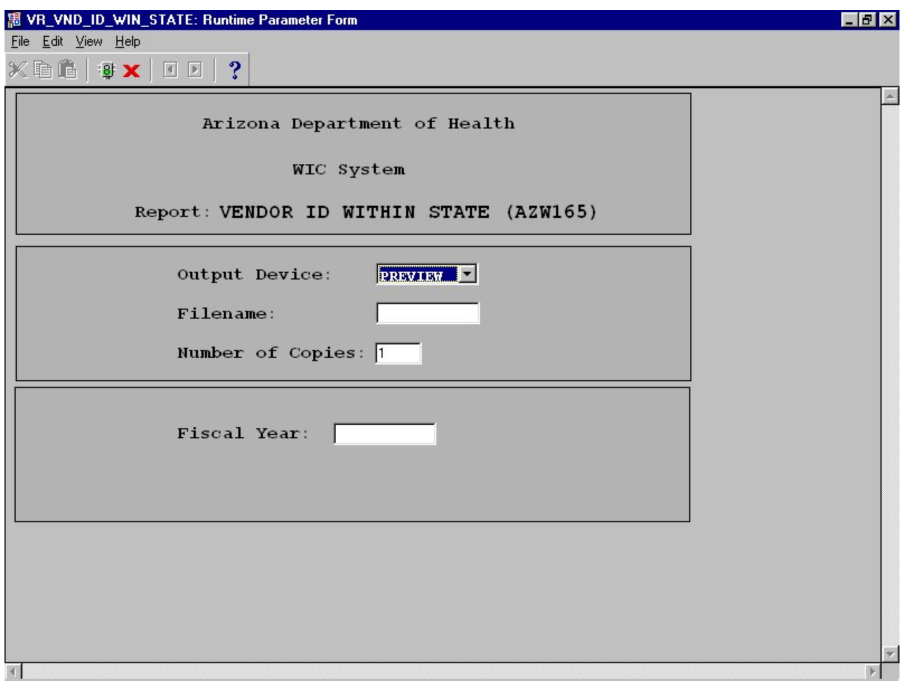


Figure 77 - Vendor ID within State

Creating a Vendor ID within State Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. TAB to the fiscal year field and enter the four digit year to be used for this report.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

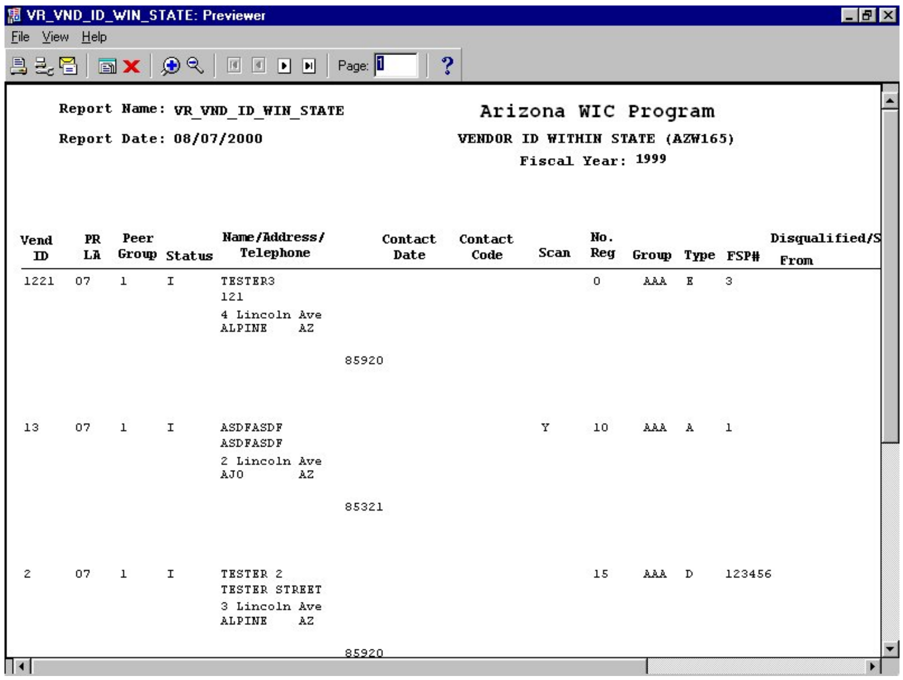


Figure 78 - Sample of Vendor ID within State Report

Figure 77 - Vendor ID within State

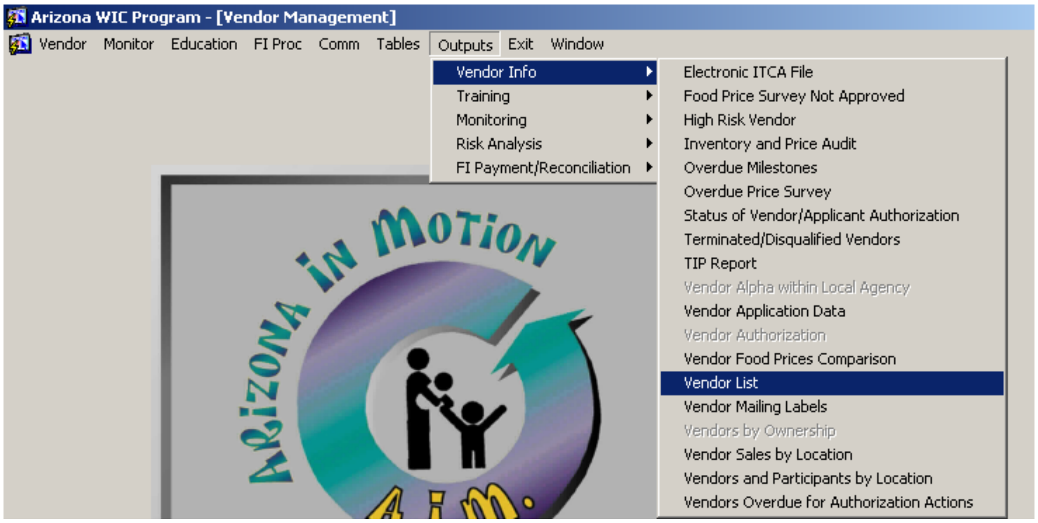
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Fiscal Year - The fiscal year from which to draw the TIP-related fields.

Producing a Vendor List Report

To Produce a Vendor Mailing Labels Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Vendor List, as shown below:



The Vendor List parameter window is displayed:

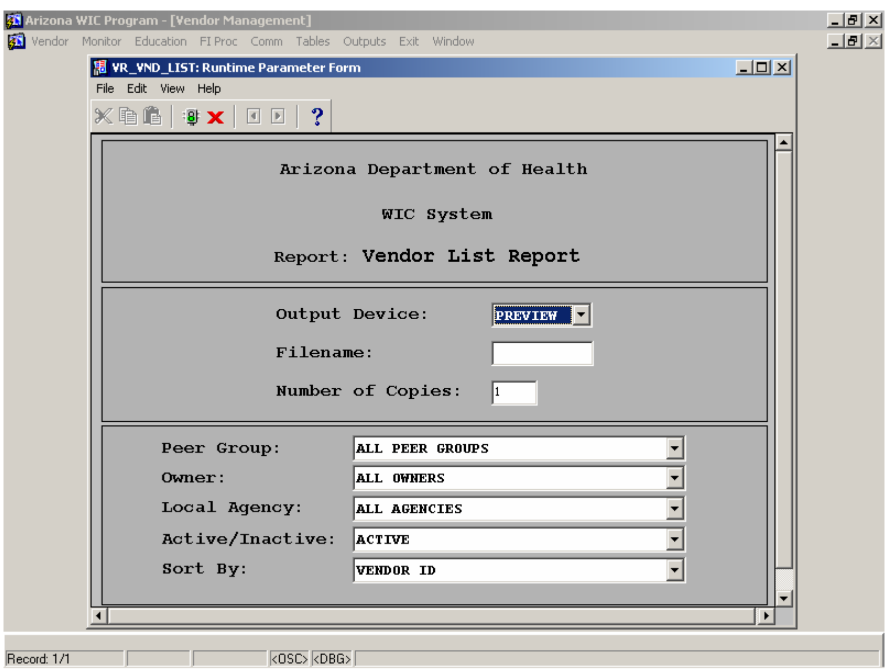
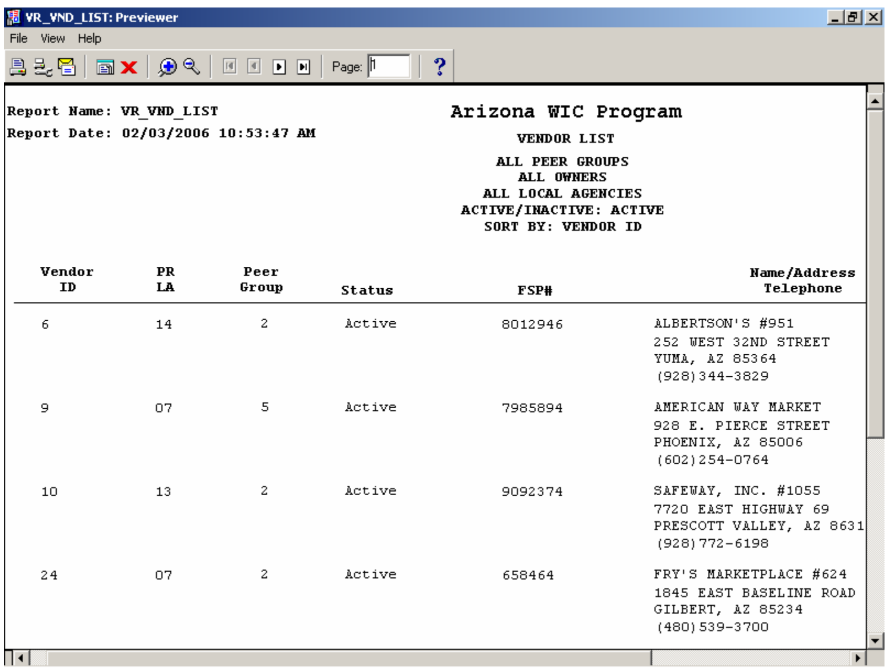


Figure 79 – Vendor List Report

Creating a Vendor List Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If choosing to run the report based on the default selections, then click the green light icon to bring up the preview screen shown below.
5. Or if more specific data is to be retrieved, then choose which type of peer group to run, then choose an owner.
6. Move to the next line and select a local agency.
7. From the next line narrow the search to Active or Inactive vendors, or Both.
8. Next select the Sort By method, either Vendor Id or Vendor Name.
9. If Preview was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Report Name: VR_VND_LIST
Report Date: 02/03/2006 10:53:47 AM

Arizona WIC Program
VENDOR LIST
ALL PEER GROUPS
ALL OWNERS
ALL LOCAL AGENCIES
ACTIVE/INACTIVE: ACTIVE
SORT BY: VENDOR ID

Vendor ID	PR LA	Peer Group	Status	FSP#	Name/Address Telephone
6	14	2	Active	8012946	ALBERTSON'S #951 252 WEST 32ND STREET YUMA, AZ 85364 (928)344-3829
9	07	5	Active	7985894	AMERICAN WAY MARKET 928 E. PIERCE STREET PHOENIX, AZ 85006 (602)254-0764
10	13	2	Active	9092374	SAFEWAY, INC. #1055 7720 EAST HIGHWAY 69 PRESCOTT VALLEY, AZ 8631 (928)772-6198
24	07	2	Active	658464	FRY'S MARKETPLACE #624 1845 EAST BASELINE ROAD GILBERT, AZ 85234 (480)539-3700

Figure 80 – Sample of the Vendor List Report

Figure 79 – Vendor List Report

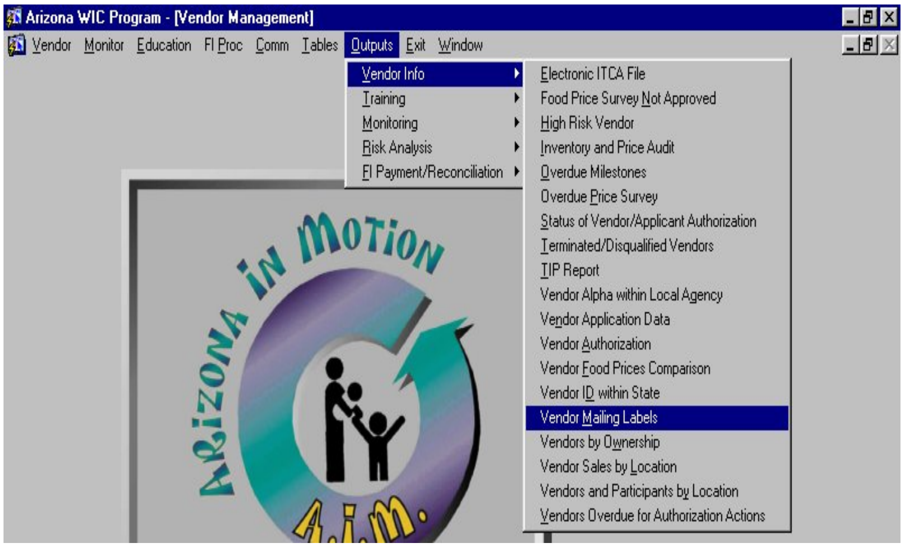
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Peer Group - The user may limit Vendors by selecting a Peer Group from a list of values.
Owner - The user may limit Vendors by selecting an Owner from a list of values.
Local Agency - The user may select a Local Agency to be queried on from the list of values.
Active/Inactive - The user may select the Active, Inactive, or Both (Active/Inactive) vendors to be queried from the list of values.
Sort By - The user may select the report to display by either Vendor Id or Vendor Name.

Producing a Vendor Mailing Labels Report

To Produce a Vendor Mailing Labels Report:

4. Click on Outputs from the menu bar.
5. Click on Vendor Info.
6. Click on Vendor Mailing Labels, as shown below:



The Vendor Mailing Labels parameter window is displayed:

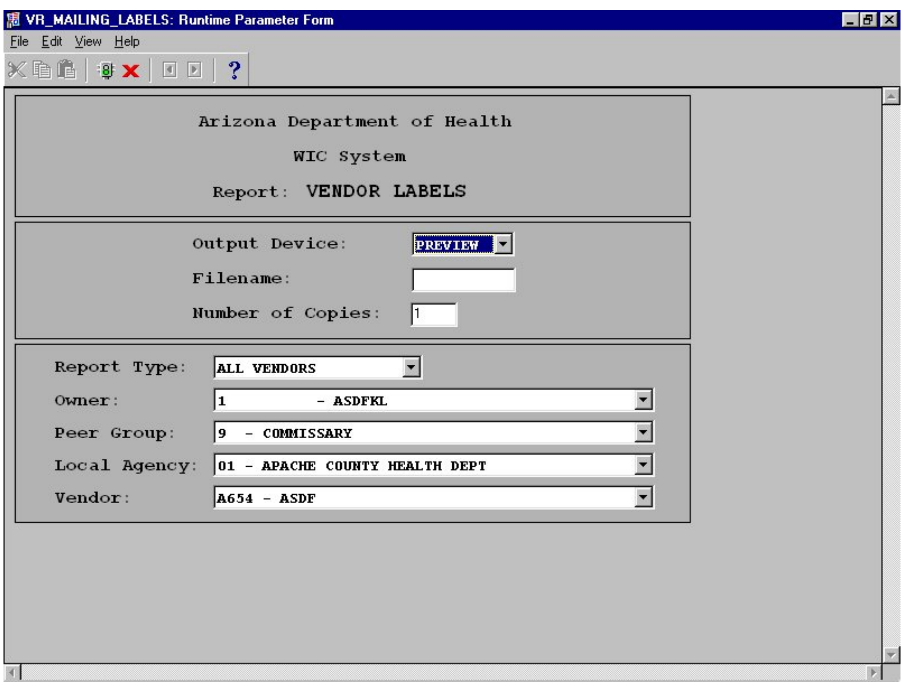


Figure 81 - Vendor Mailing Labels

Creating a Vendor Mailing Labels Report

10. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
11. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
12. Select the number of copies of the report to print by typing that number in the Copies field.
13. Choose which type of report to run, then choose an owner.
14. Move to the next line and enter a peer group and then a local agency.
15. Choose a vendor from the drop down list.
16. If Preview was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

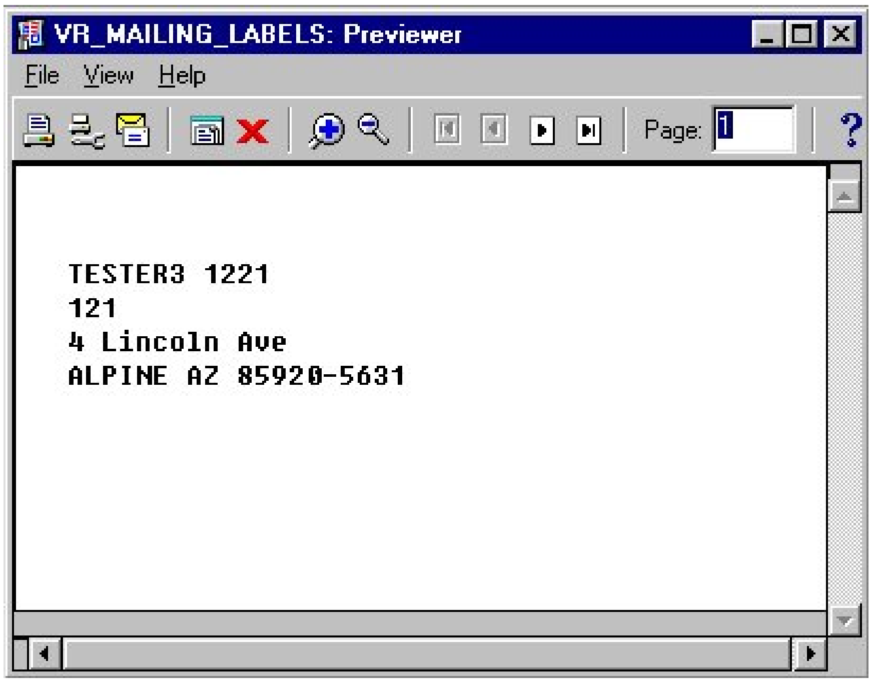


Figure 82 - Sample of Vendor Mailing Labels Report

Figure 81 - Vendor Mailing Labels

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select all Vendors or any particular Vendor: all, Owner, Peer Group, Local Agency or Vendor.
Owner - The user may limit Vendors by selecting an Owner from a list of values.
Peer Group - The user may limit Vendors by selecting a Peer Group from a list of values.
Local Agency - The user may select a Local Agency to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.

Producing a Vendors by Ownership Report (No longer in use by AZ 10/17/2005 – no access to report via AIM.)

To Produce a Vendors By Ownership Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Vendors by Ownership, as shown below:

The Vendors by Ownership parameter window is displayed:

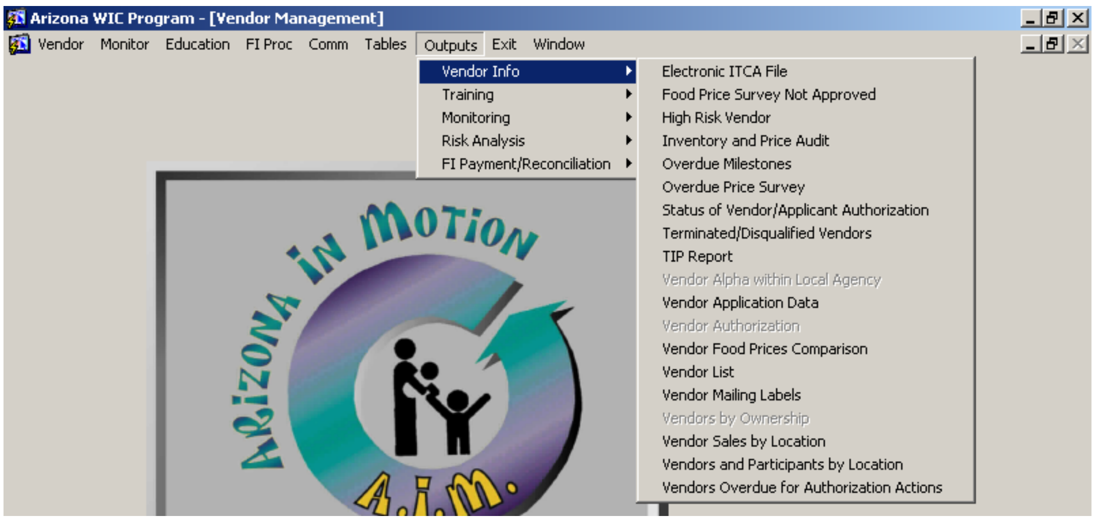


Figure 83 - Vendors by Ownership

Creating a Vendors by Ownership Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

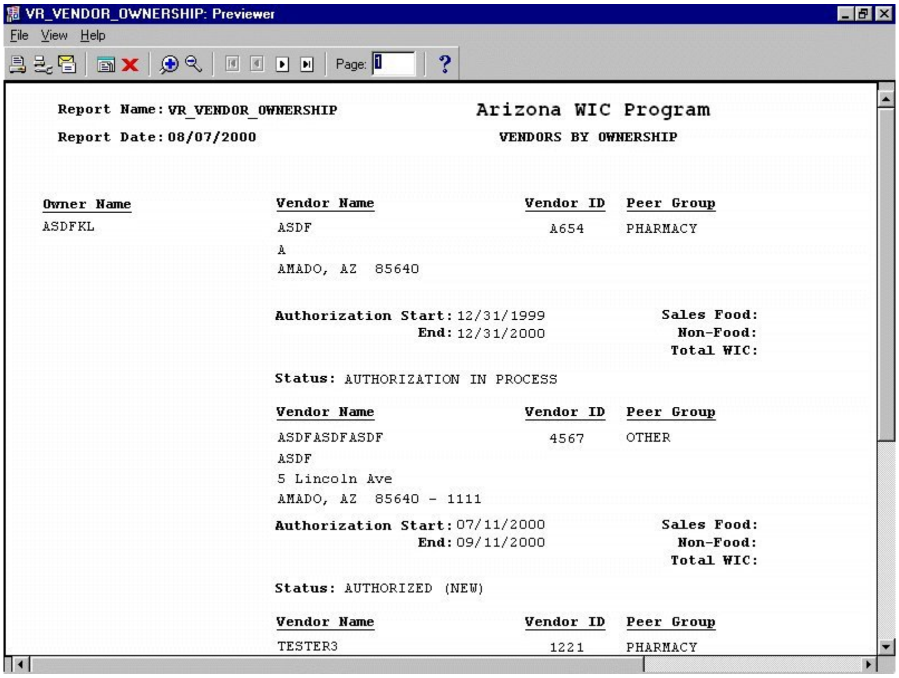


Figure 84 - Sample of Vendors by Ownership Report

Figure 83 - Vendors by Ownership

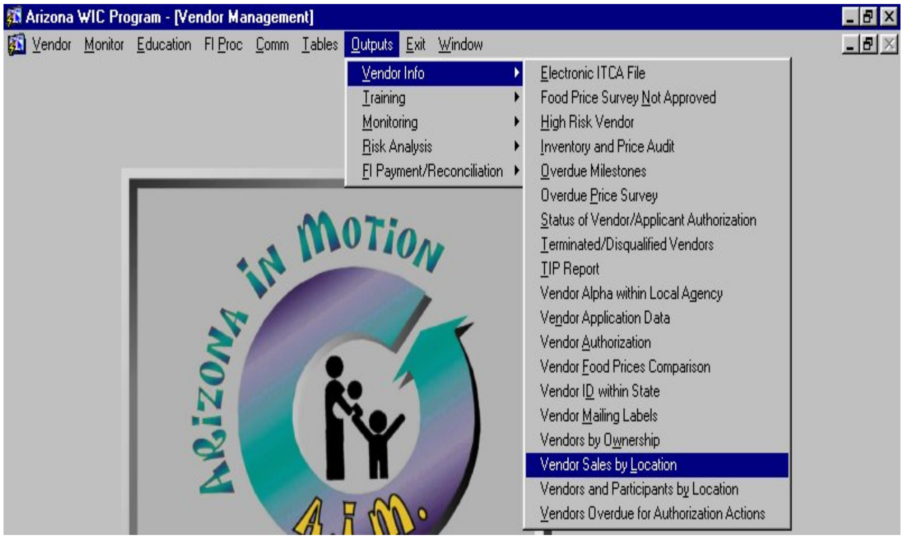
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a Vendor Sales by Location Report

To Produce a Vendor Sales by Location Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Vendor Sales by Location, as shown below:



The Vendor Sales by Location parameter window is displayed:

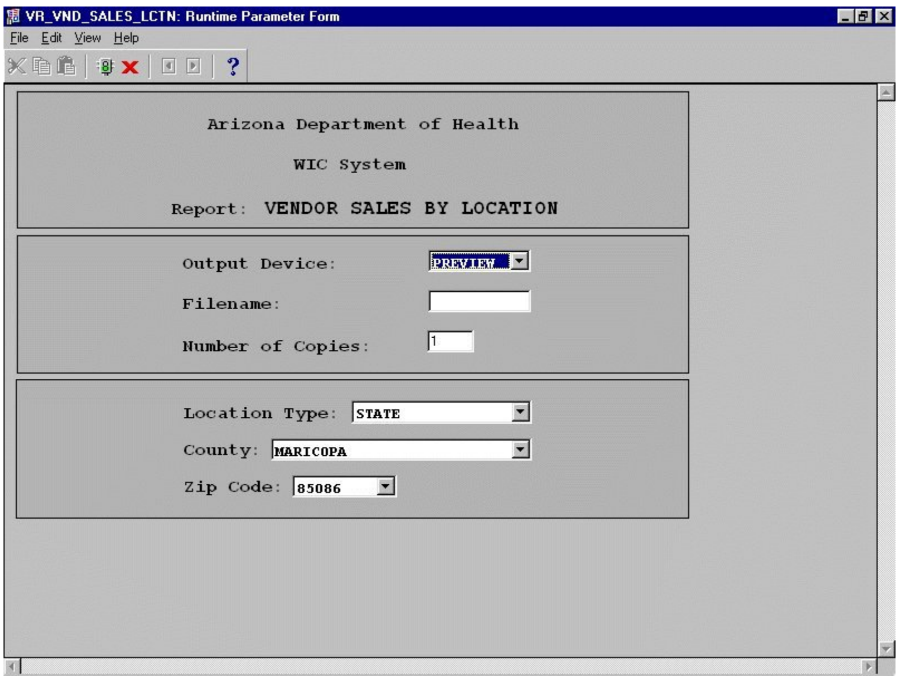
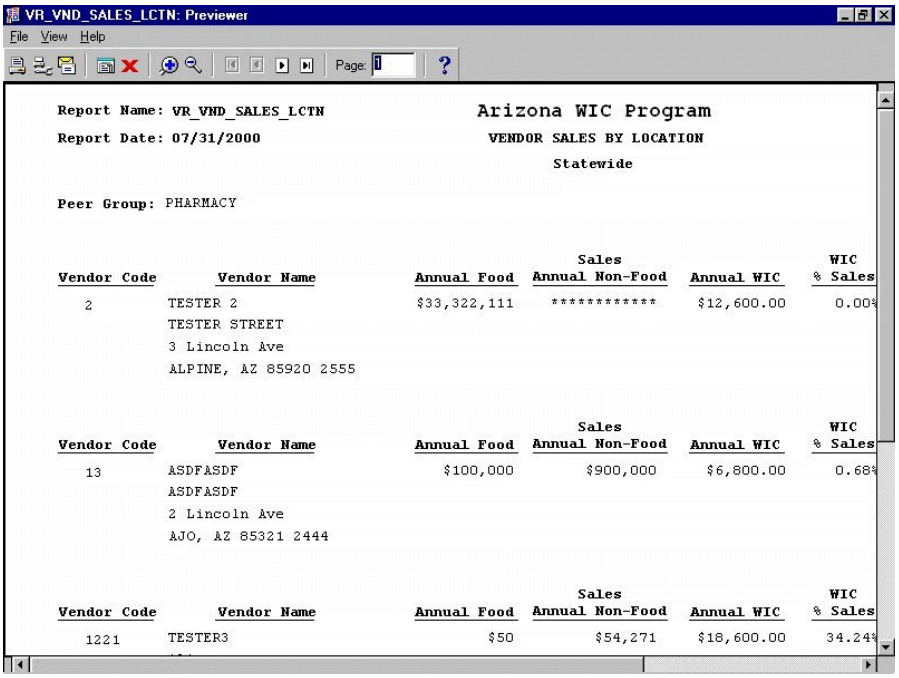


Figure 85 - Vendor Sales by Location

Creating a Vendor Sales by Location Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Move down to the location type field and select from the drop down list.
5. Continue down to the county field and again select from the drop down list.
6. Then move on to the zip code field and select from the drop down list.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Report Name: VR_VND_SALES_LCTN
Report Date: 07/31/2000

Arizona WIC Program
VENDOR SALES BY LOCATION
Statewide

Peer Group: PHARMACY

Vendor Code	Vendor Name	Annual Food	Sales Annual Non-Food	Annual WIC	WIC % Sales
2	TESTER 2 TESTER STREET 3 Lincoln Ave ALPINE, AZ 85920 2555	$33,322,111	************	$12,600.00	0.00%
13	ASDFASDF ASDFASDF 2 Lincoln Ave AJO, AZ 85321 2444	$100,000	$900,000	$6,800.00	0.68%
1221	TESTER3	$50	$54,271	$18,600.00	34.24%

Figure 86 - Sample of Vendor Sales by Location Report

Figure 85 - Vendor Sales by Location

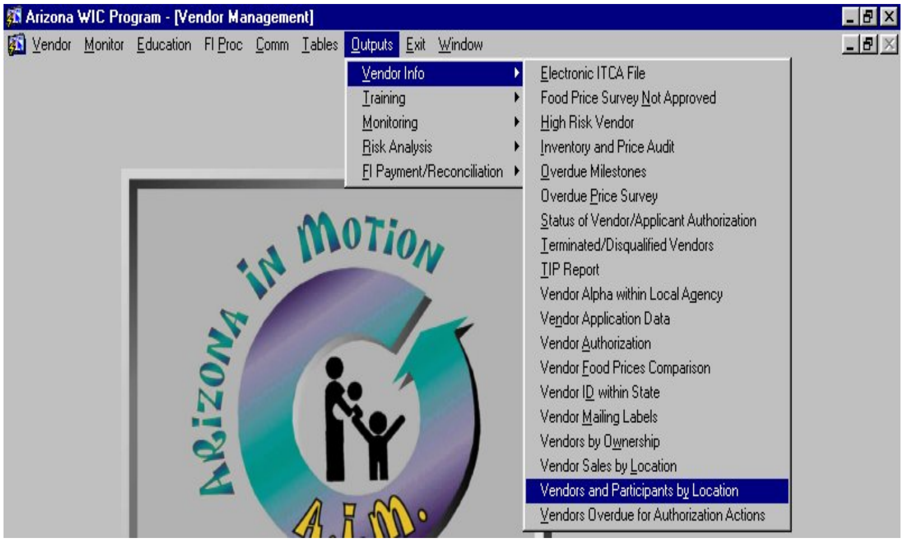
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Location Type - The user may select all Vendors or any particular Vendor: all, County, or Zip Code
County - The county that the Vendors are located in may be selected from the list of values.
Zip Code - The zip code that the Vendors are located in may be selected from the list of values.

Producing a Vendors & Participants by Location Report

To Produce a Vendors & Participants by Location Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Vendors and Participants by Location as shown below:



The Vendors & Participants by Location parameter window is displayed:

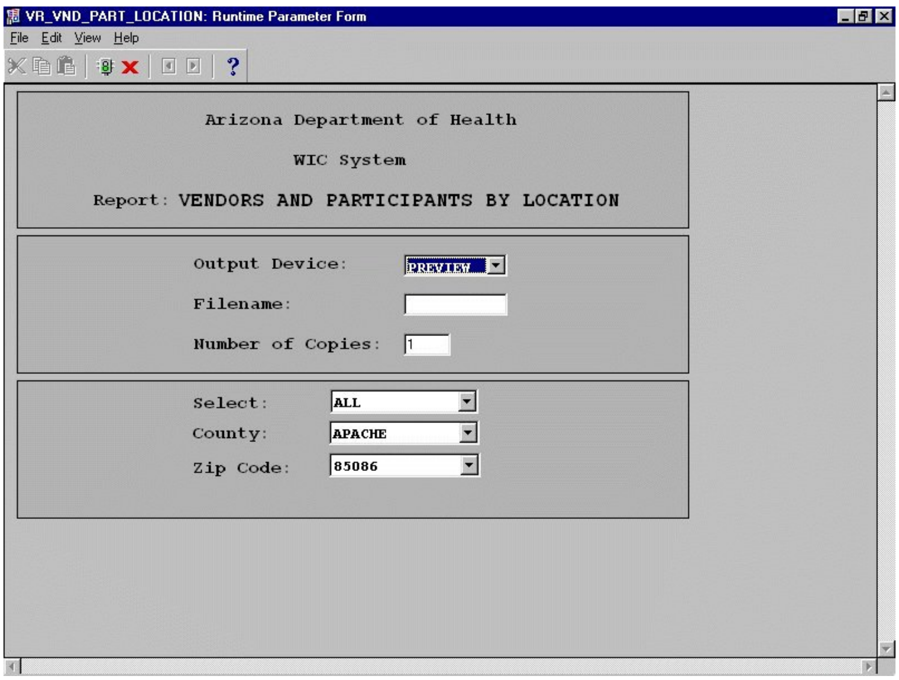


Figure 87 - Vendors & Participants by Location Criteria

Creating a Vendors & Participants by Location Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Move down to the select field and choose from the drop down list.
5. Continue down to the county field and again select from the drop down list.
6. Then move on to the zip code field and select from the drop down list.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

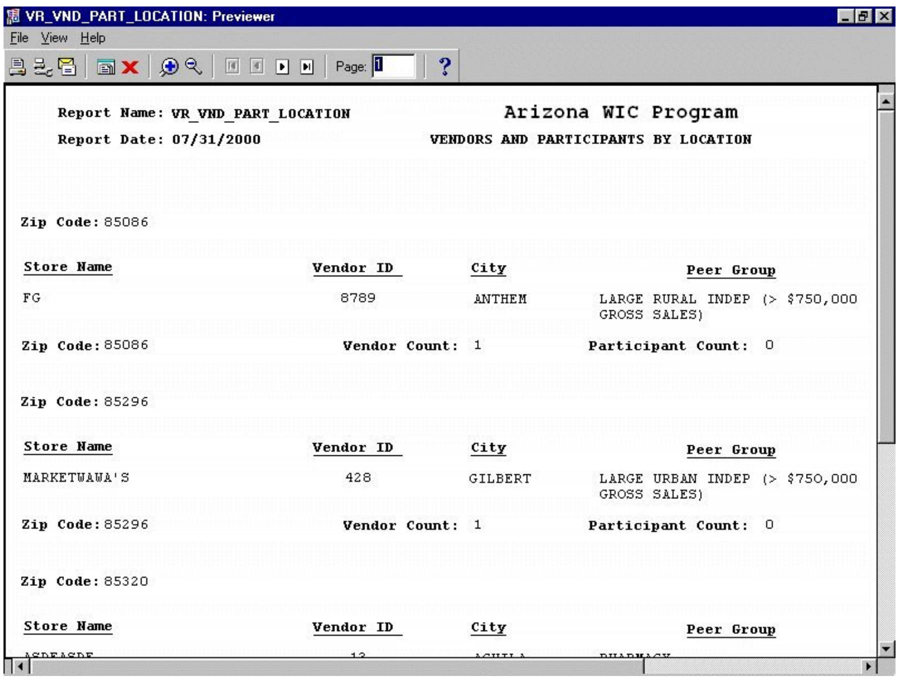


Figure 88 - Sample of Vendors & Participants by Location Report

Figure 87 - Vendors & Participants by Location Criteria

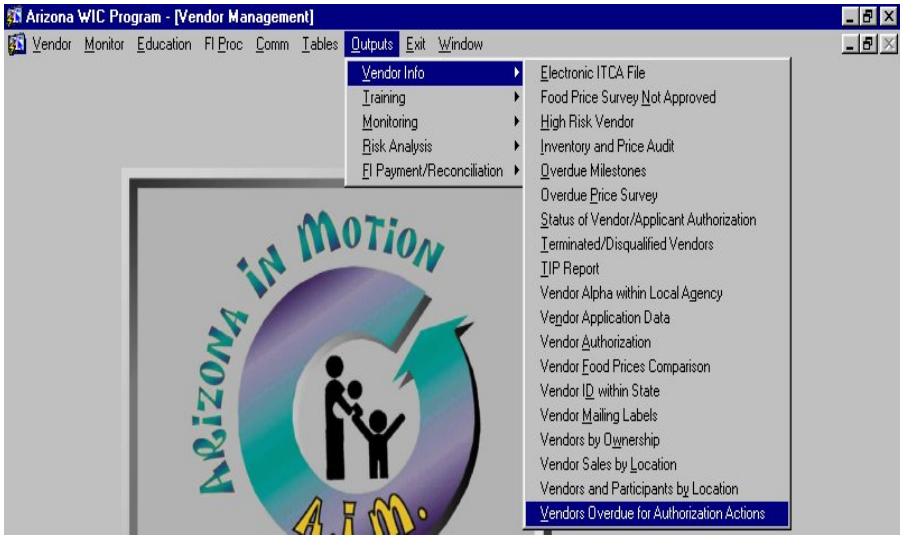
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Select - The user may select all Vendors or any particular Vendor: all, County, or Zip Code.
County - The county that the Vendors are located may be selected from the list of values.
Zip Code - The zip code that the Vendors are located may be selected from the list of values.

Producing a Vendors Overdue for Authorization Actions Report

To Produce a Vendors Overdue for Authorization Actions Report:

1. Click on Outputs from the menu bar.
2. Click on Vendor Info.
3. Click on Vendors Overdue for Authorization Actions, as shown below:



The Vendors Overdue for Authorization Actions parameter window is displayed:

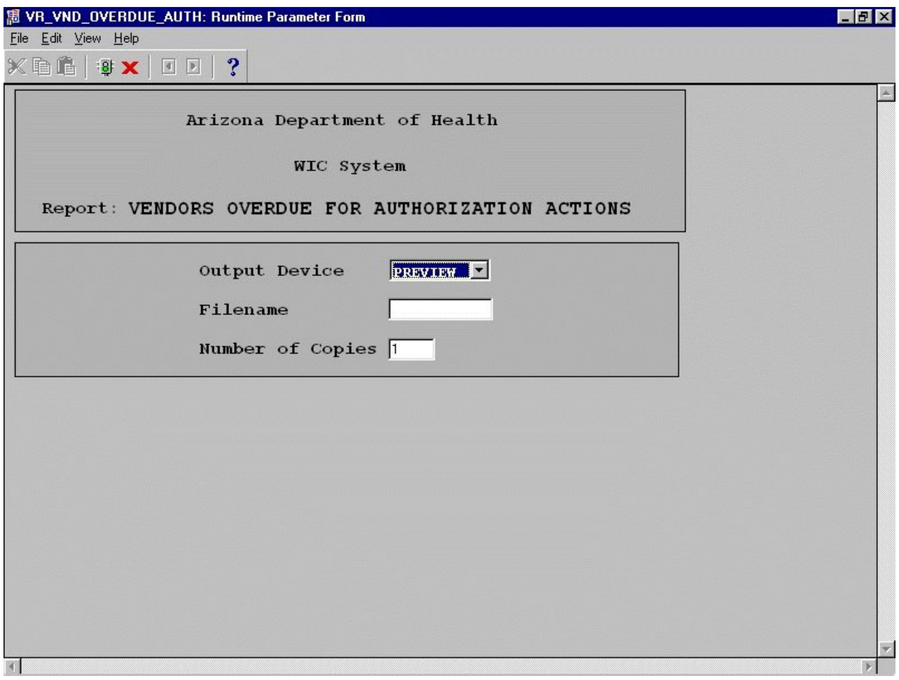


Figure 89 - Vendors Overdue for Authorization Actions

Creating a Vendors Overdue for Authorization Actions Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

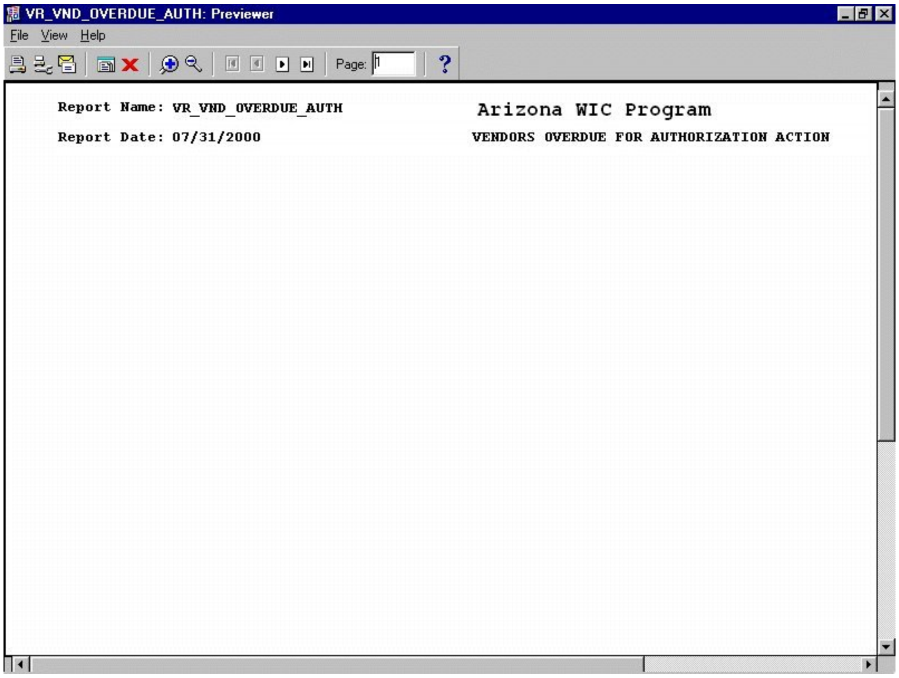


Figure 90 - Sample of Vendors Overdue for Authorization Actions Report

Figure 89 - Vendors Overdue for Authorization Actions

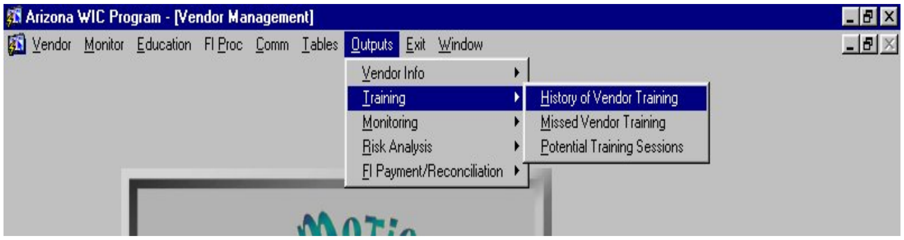
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a History of Vendor Training Report

To Produce a History of Vendor Training Report:

1. Click on Outputs from the menu bar.
2. Click on Training.
3. Click on History of Vendor Training, as shown below:



The History of Vendor Training parameter window is displayed:

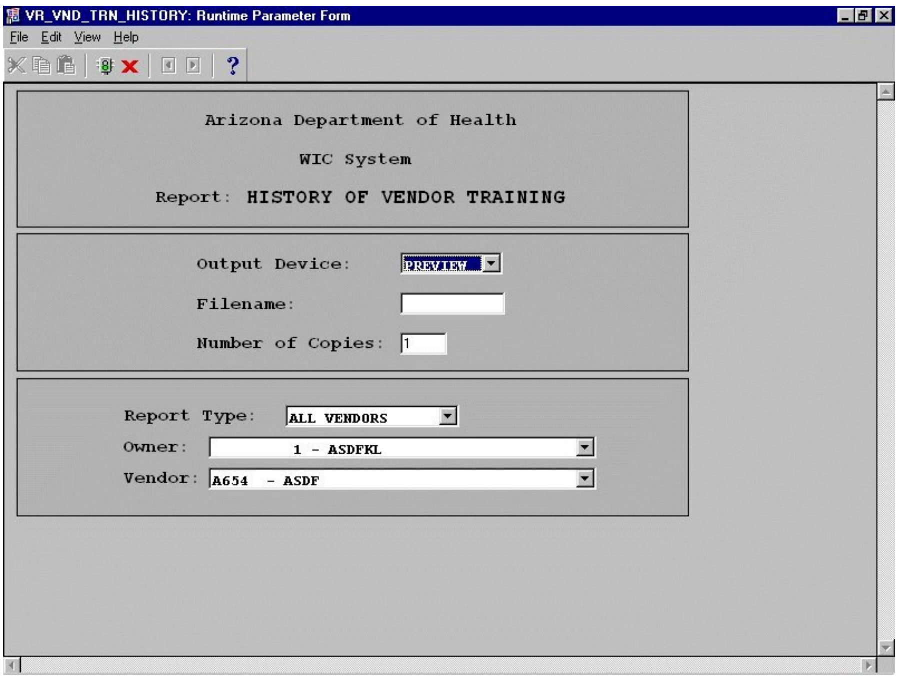


Figure 91 - History of Vendor Training

Creating a History of Vendor Training Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Move onto the report type field and choose a selection.
5. Now go to the owner field as well as the vendor field using the drop down list.

6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

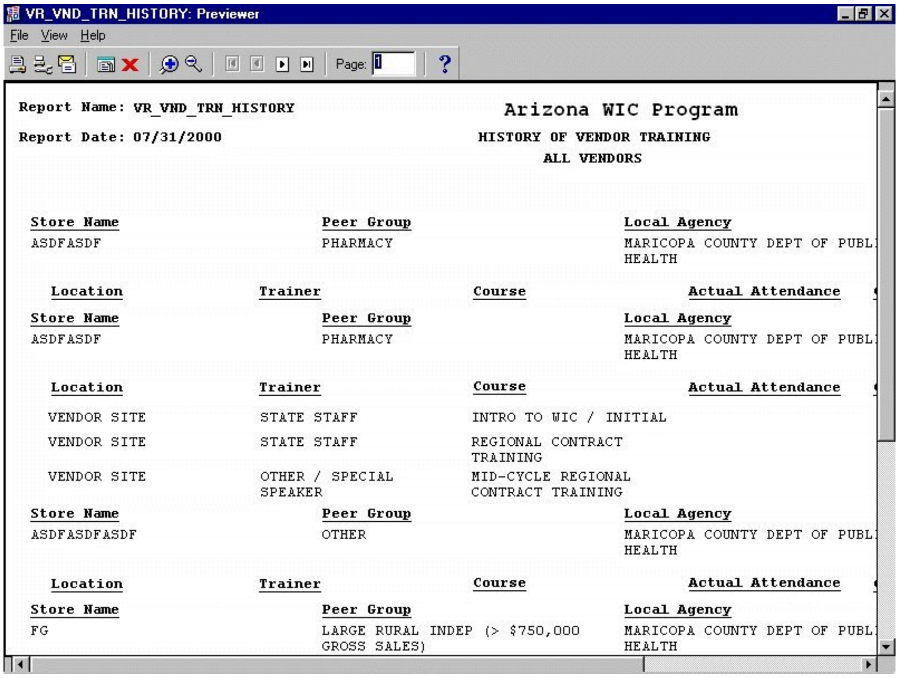


Figure 92 - Sample of History of Vendor Training Report

Figure 91 - History of Vendor Training

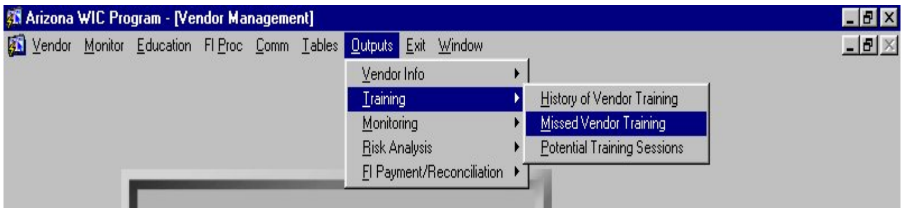
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.

Producing a Missed Vendor Training Report

To Produce a Missed Vendor Training Report:

1. Click on Outputs from the menu bar.
2. Click on Training.
3. Click on Missed Vendor Training, as shown below:



The Missed Vendor Training parameter window is displayed:

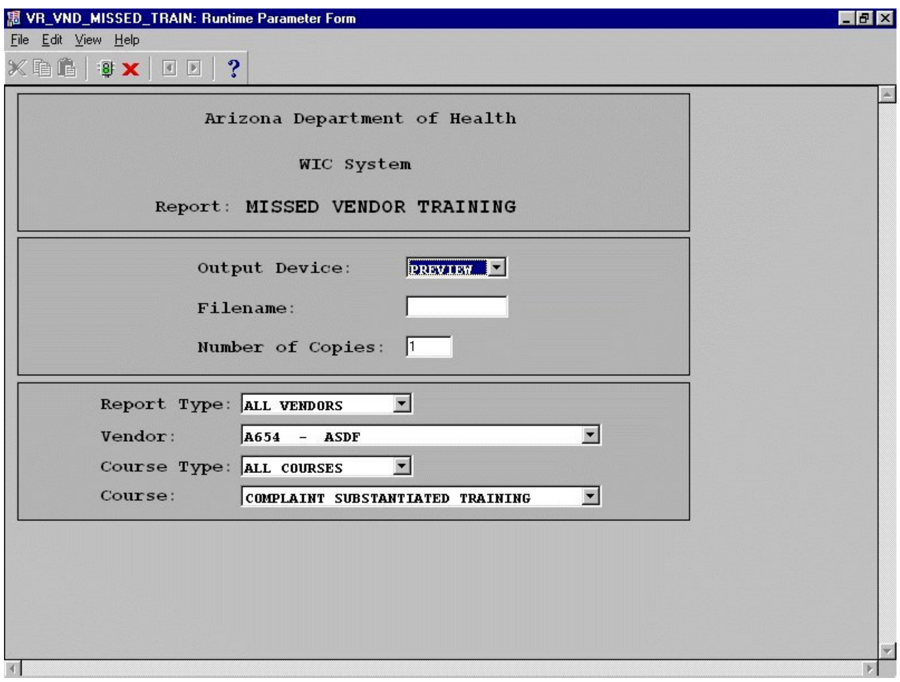


Figure 93 - Missed Vendor Training

Creating a Missed Vendor Training Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Move to the report type field and choose a selection, followed by the vendor field which has a drop down list also available
5. Use the drop down list to choose a course type and then choose the course itself.

6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

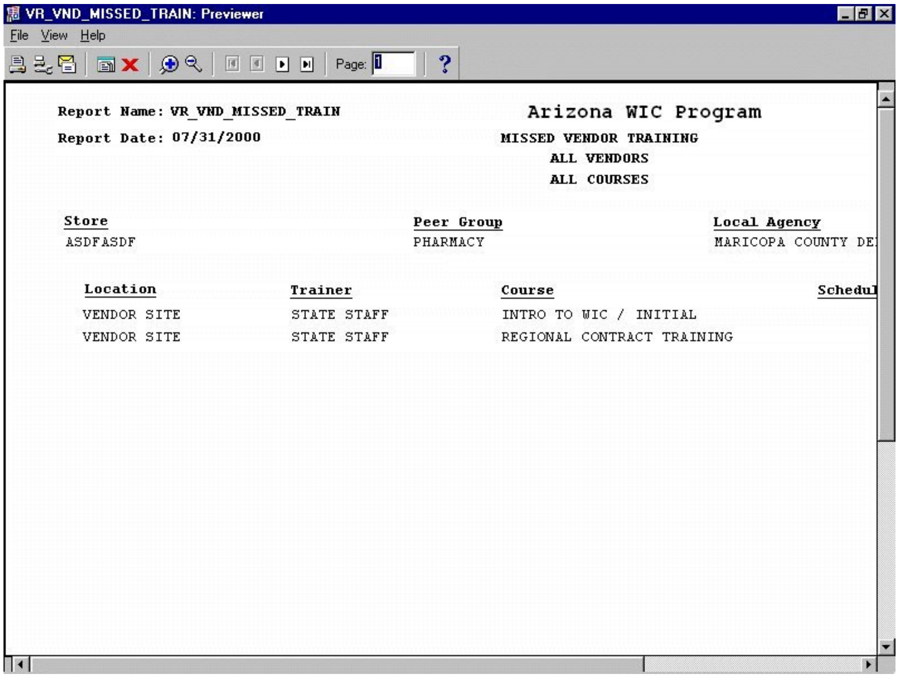


Figure 94 - Sample of Missed Vendor Training Report

Figure 93 - Missed Vendor Training

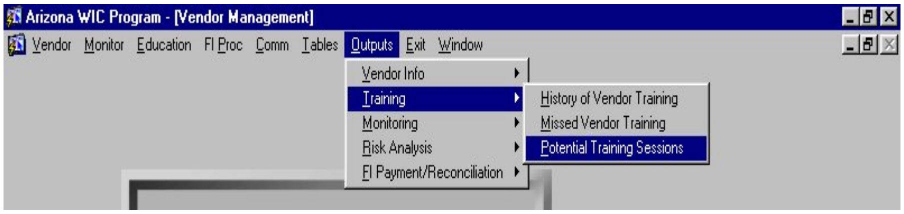
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select all Vendors or any particular Vendor: all or one Vendor.
Vendor - The user may select the Vendor to be queried on from the list of values.
Course Type - The user enters all courses or single course.
Course - The user enters this field if single course is chosen.

Producing a Potential Training Sessions Report

To Produce a Potential Training Sessions Report:

1. Click on Outputs from the menu bar.
2. Click on Training.
3. Click on Potential Training Sessions, as shown below:



The Potential Training Sessions parameter window is displayed:

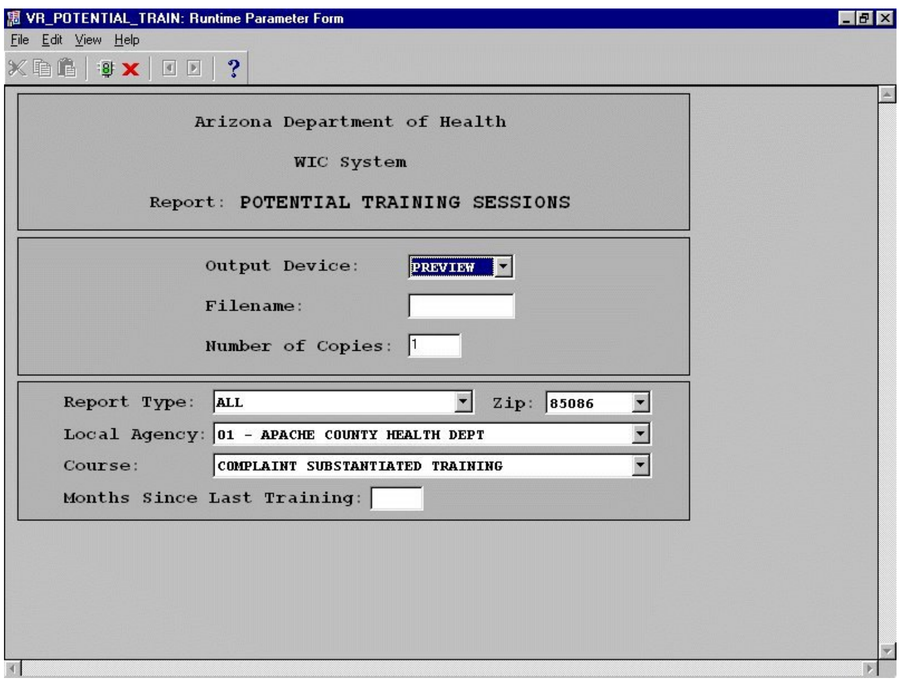


Figure 95 - Potential Training Sessions Criteria

Creating a Potential Training Sessions Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Move onto the report type field and choose a selection, followed by the zip code field which has a drop down list also available
5. Use the drop down list to choose a local agency and then fill out the course field using the drop down

list.

6. Enter the number of months it has been since the last training session.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

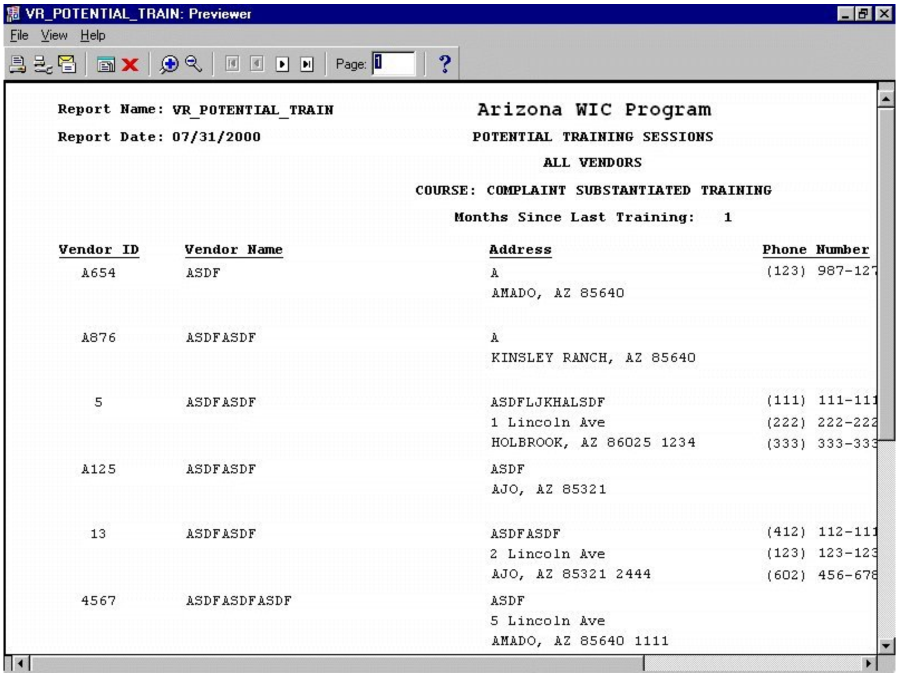


Figure 96 - Sample of Potential Training Sessions Report

Figure 95 - Potential Training Sessions Criteria

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select all Vendors or a subset of Vendors: all, Local Agency, or Zip Code.
Zip - The user may select the zip code to be queried on from the list of values.
Local Agency - The user may select the Local Agency to be queried on from the list of values.
Course - The education course that should be searched for potential Vendors to attend training.
Months Since Last Training - The number of months since the last Vendor representatives attended the training course.

Producing an Appeals Report

To Produce an Appeals Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Appeals as shown below:

The Appeals runtime parameter window is displayed:

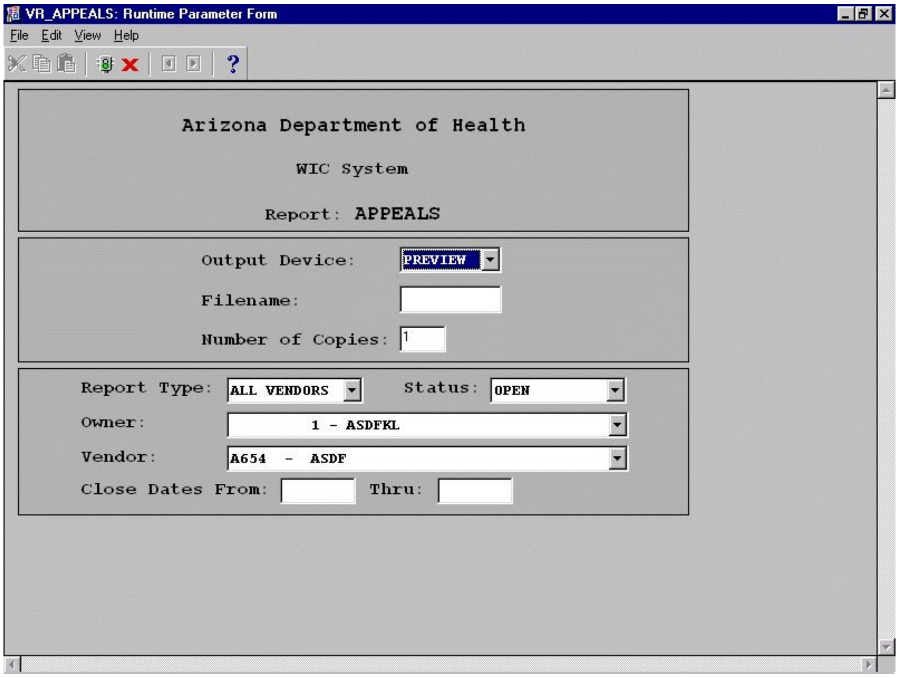


Figure 97 - Appeals

Creating an Appeals Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the Report Level to run the report for.
5. Select the Status as Open or Closed for the status to run the report for.
6. Select the Owner for the report to be run for.
7. Select the Vendor for which the report is to be run.
8. Type in the Appeal Close dates From as the beginning date of the data queried.
9. Type in the ending date of the data queried in the Thru field.
10. Type in the fiscal year for which to run the appeals report. The user may limit the report to one fiscal year.
11. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

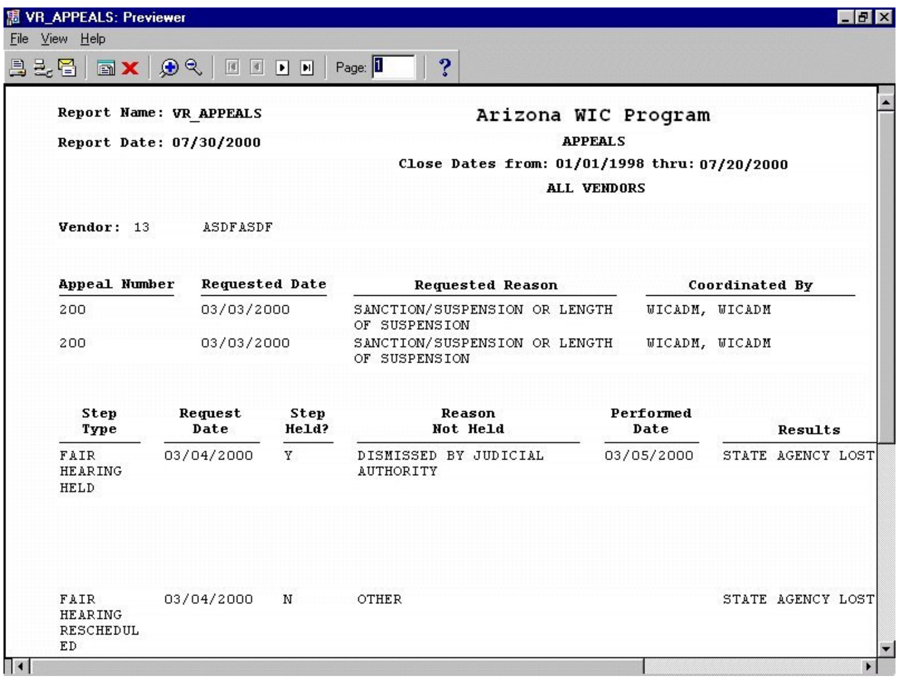


Figure 98 - Sample Appeals Report

Figure 97 - Appeals

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select all Vendors or any particular Vendor: all, Owner, or Vendor.
Status - The user may limit the Appeals to those that are open, closed or all Appeals.
Owner - The user may limit Vendors by selecting an Owner from a list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.

Close Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Civil Money Penalty Report

To Produce a Civil Money Penalty Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Civil Money Penalty as sown below:

The Civil Money Penalty parameter window is displayed:

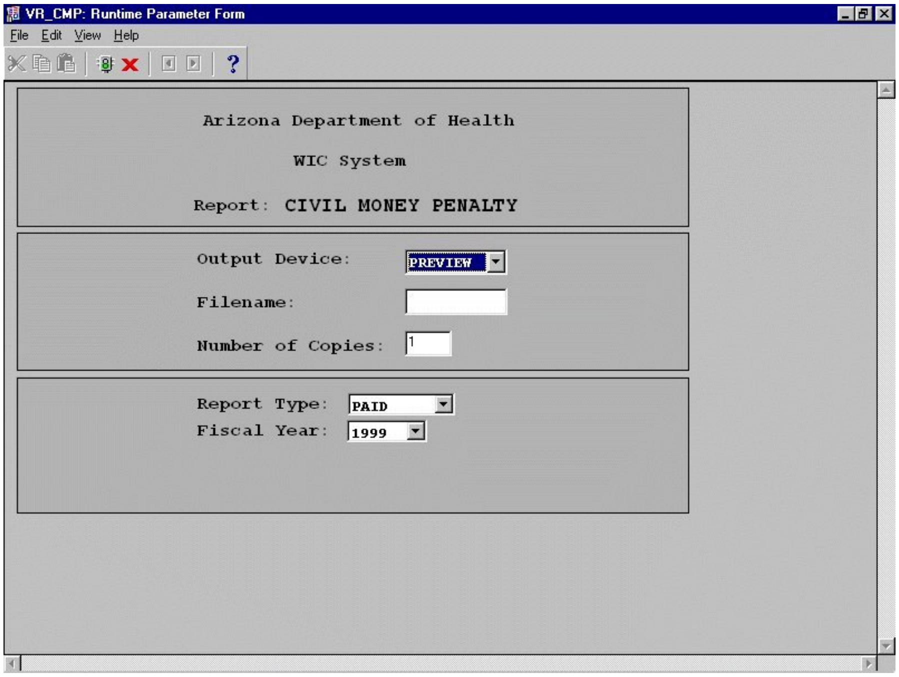


Figure 99 - Civil Money Penalty

Creating a Civil Money Penalty Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Then select the fiscal year from the drop down list.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

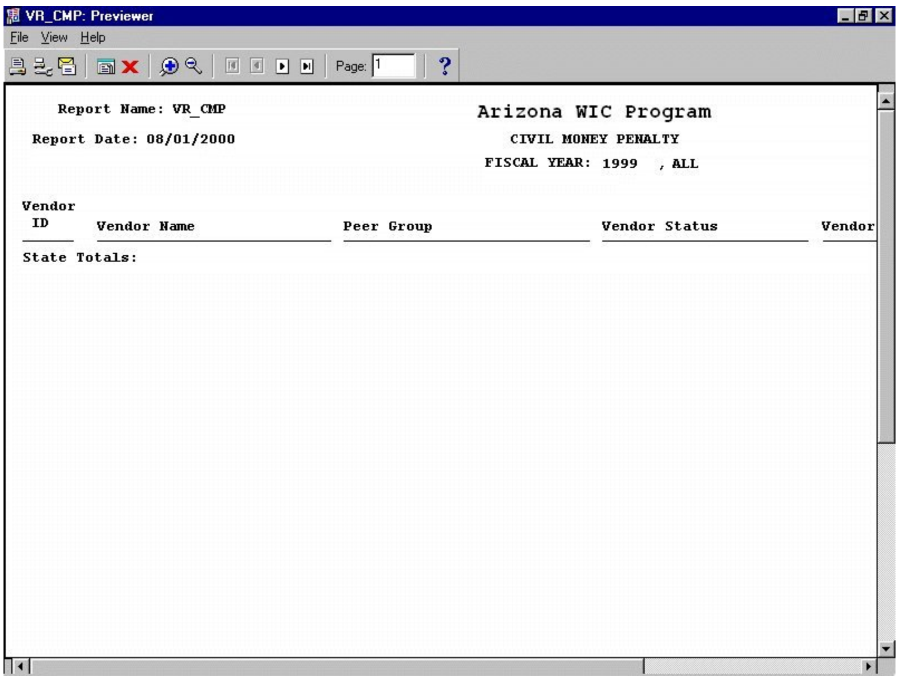


Figure 100 - Sample of Civil Money Penalty Report

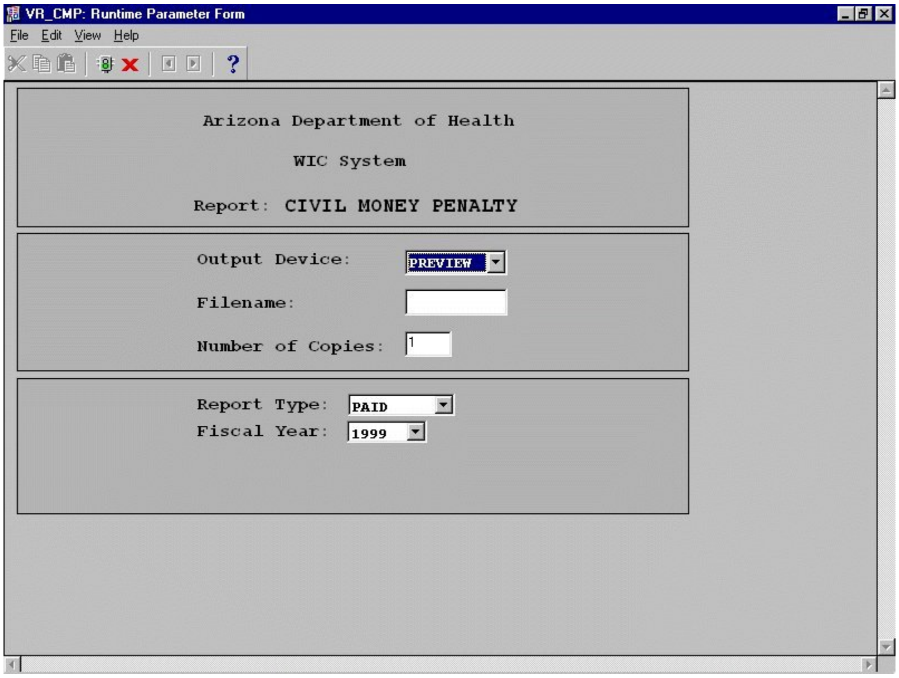


Figure 99 - Civil Money Penalty

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select paid, unpaid or all civil money penalties.
Fiscal Year - The user may limit civil money penalties to one fiscal year.

Producing a Complaint Log Report

To Produce a Complaint Log Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Complaint Log as shown below:

The Complaint Log parameter window is displayed:

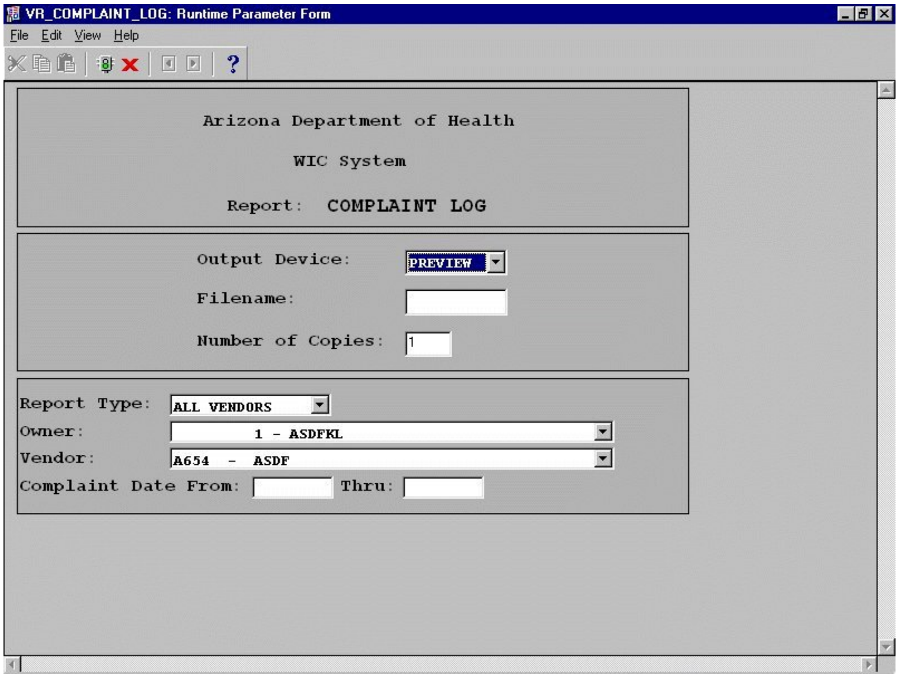


Figure 101 - Complaint Log

Creating a Complaint Log Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Select an owner or vendor from their respective drop down lists depending on the report type.
6. Type in a complaint date from and thru in standard (MM/DD/YYYY) format.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

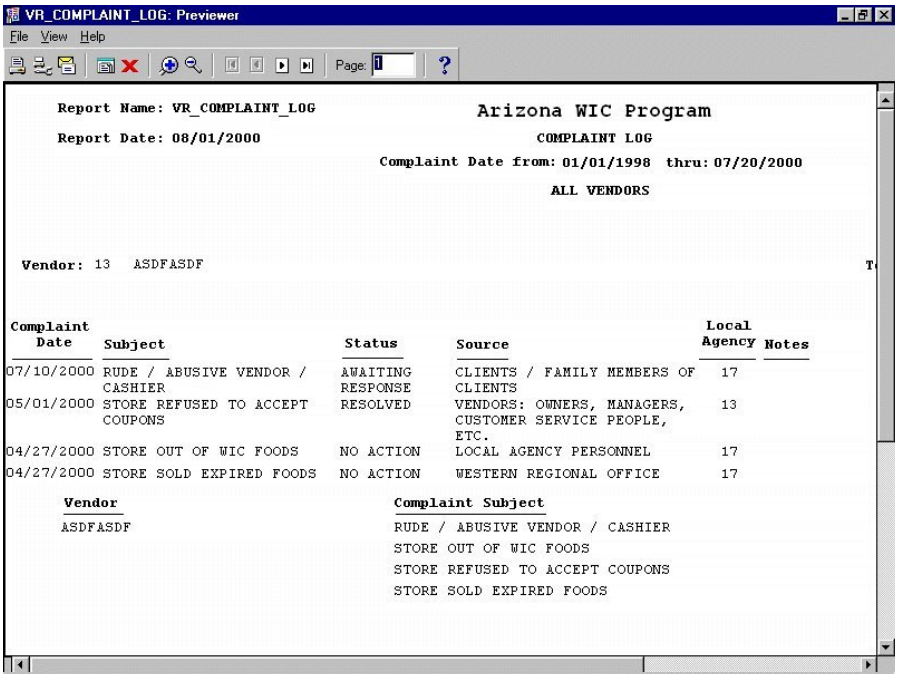


Figure 102 - Sample of Complaint Log Report

Figure 101 - Complaint Log

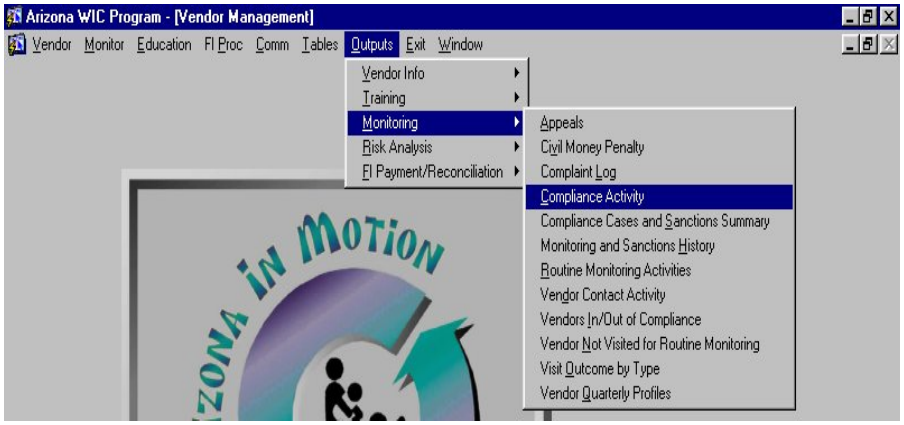
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.
Complaint Date From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Compliance Activity Report

To Produce a Compliance Activity Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Compliance Activity as shown below:



The Compliance Activity parameter window is displayed:

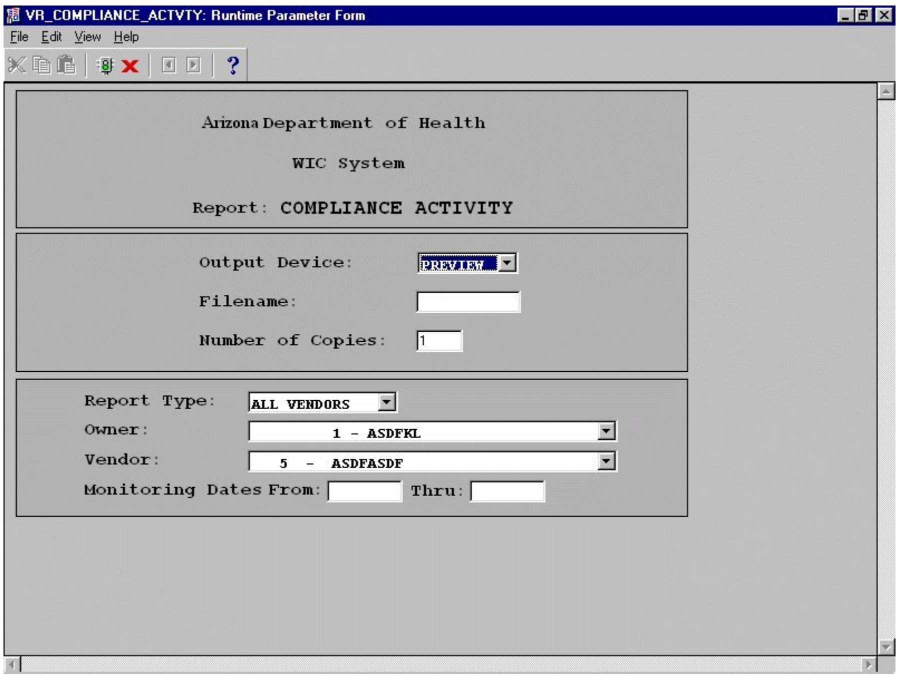


Figure 103 - Compliance Activity

Creating a Compliance Activity Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Select an owner or vendor from their respective drop down lists depending on the report type.
6. Type in a monitoring date from and thru in standard (MM/DD/YYYY) format.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

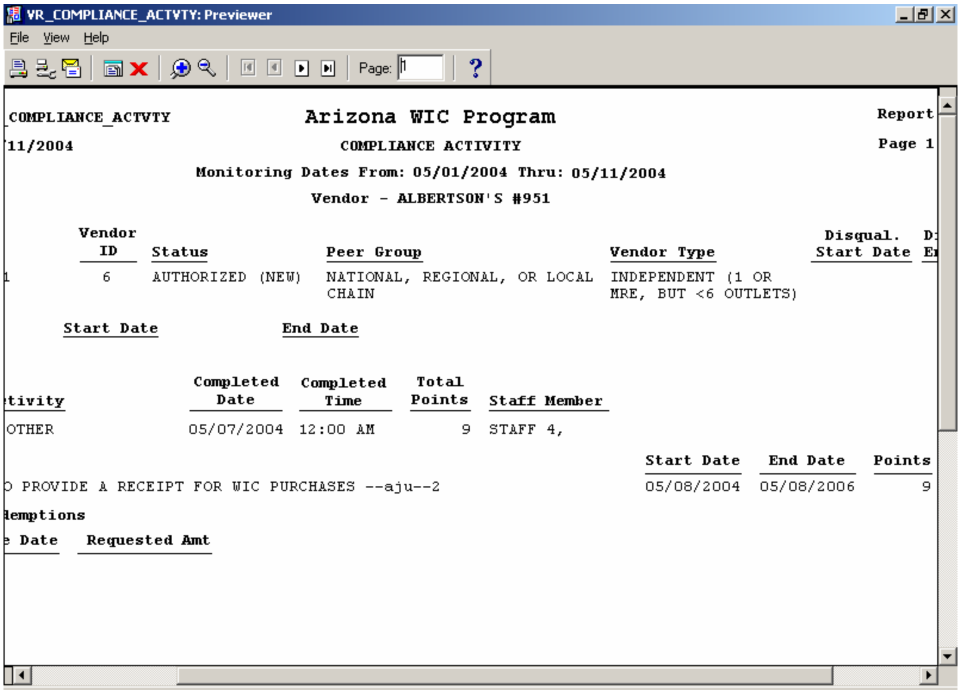


Figure 104 - Sample of Compliance Activity Report

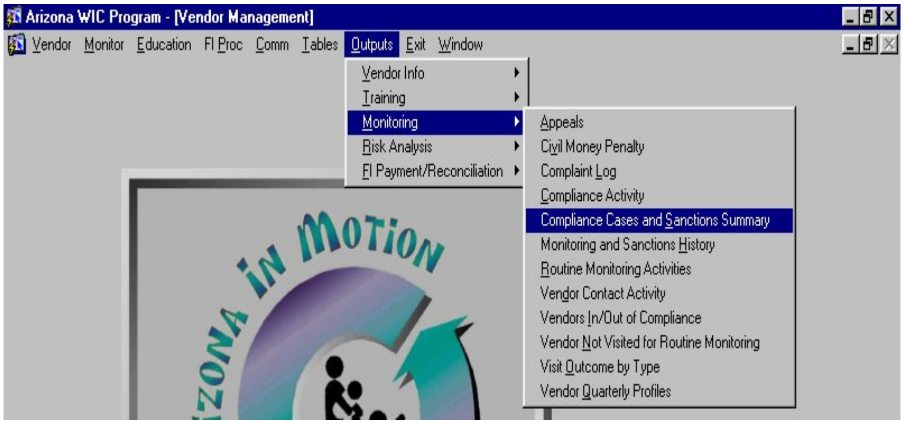
Figure 103 - Compliance Activity

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.
Monitoring Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Compliance Cases & Sanctions History Report

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Compliance Cases & Sanctions History as shown below:



The Compliance Cases & Sanctions History parameter window is displayed:

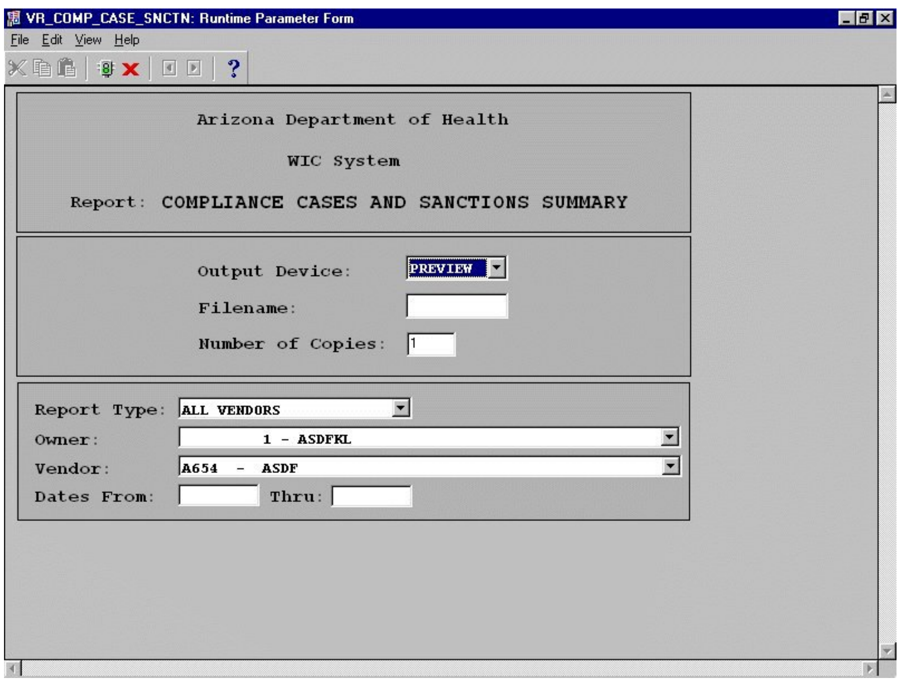


Figure 105 - Compliance Cases & Sanctions History

Creating a Compliance Cases & Sanctions History Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Select an owner or vendor from their respective drop down lists depending on the report type.
6. Type in a dates from and thru in standard (MM/DD/YYYY) format.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

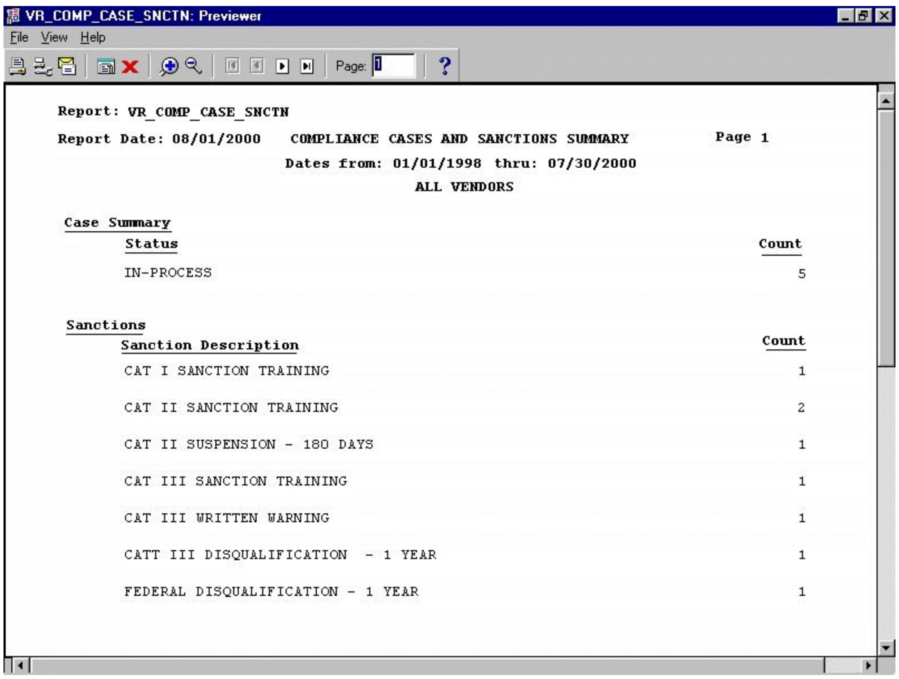


Figure 106 - Sample of Compliance Cases & Sanctions History Report

Figure 105 - Compliance Cases & Sanctions History

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.
Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Monitoring & Sanctions History Report

To Produce a Monitoring and Sanctions History Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Monitoring & Sanctions History, as shown below:

The Monitoring & Sanctions History parameter window is displayed:

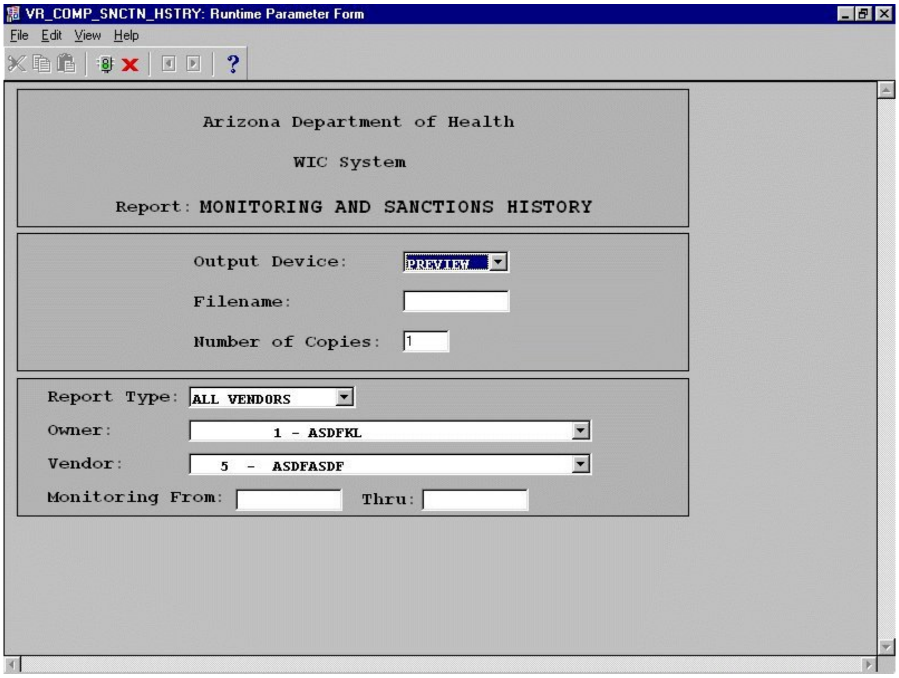


Figure 107 - Monitoring & Sanctions History

Creating a Monitoring & Sanctions History Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Select an owner or vendor from their respective drop down lists depending on the report type.
6. Type in a monitoring date from and thru in standard (MM/DD/YYYY) format.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

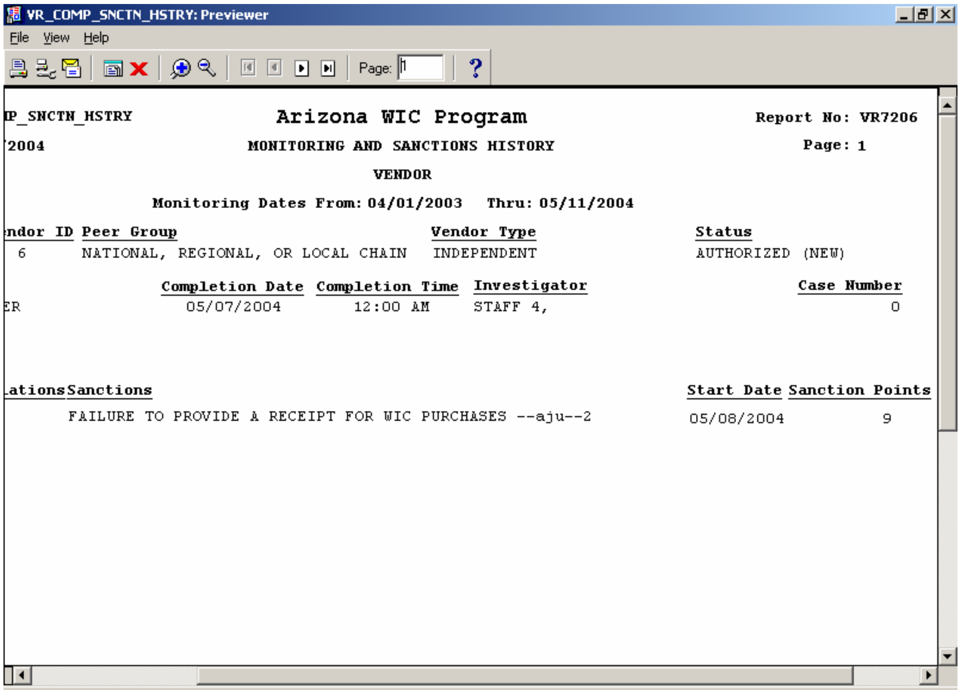


Figure 108 - Sample of Monitoring & Sanctions History Report

Figure 107 - Monitoring & Sanctions History

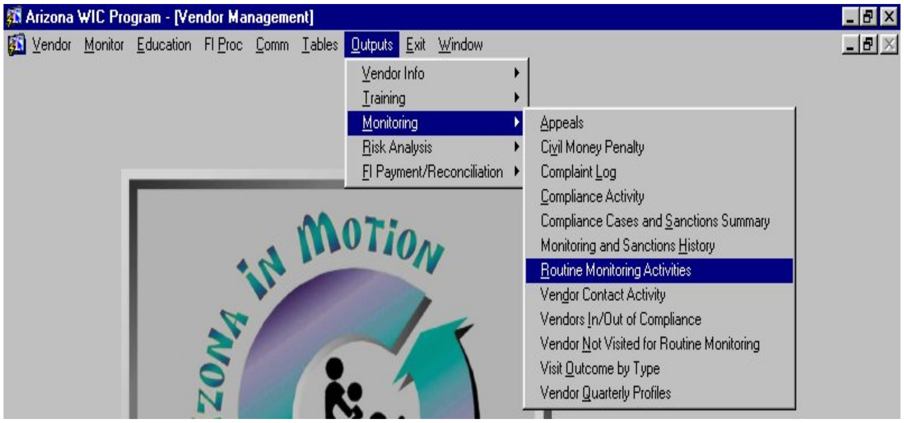
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.
Monitoring Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Routine Monitoring Activities Report

To Produce a Routine Monitoring Activities Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Routine Monitoring Activities as shown below:



The Routine Monitoring Activities parameter window is displayed:

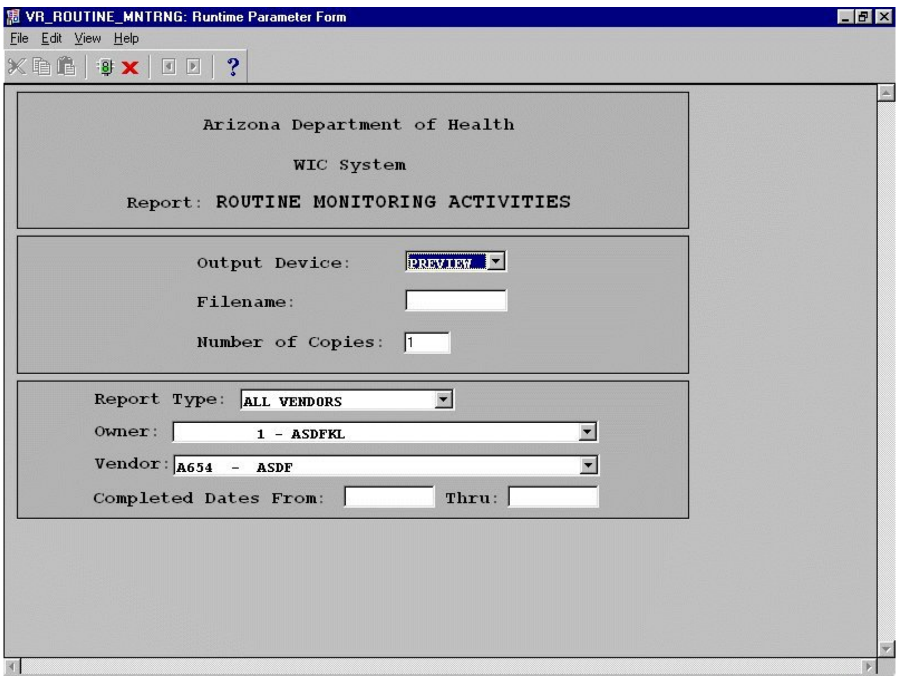


Figure 109 - Routine Monitoring Activities

Creating a Routine Monitoring Activities Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Select an owner or vendor from their respective drop down lists depending on the report type.
6. Type in a completed date from and thru in standard (MM/DD/YYYY) format
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

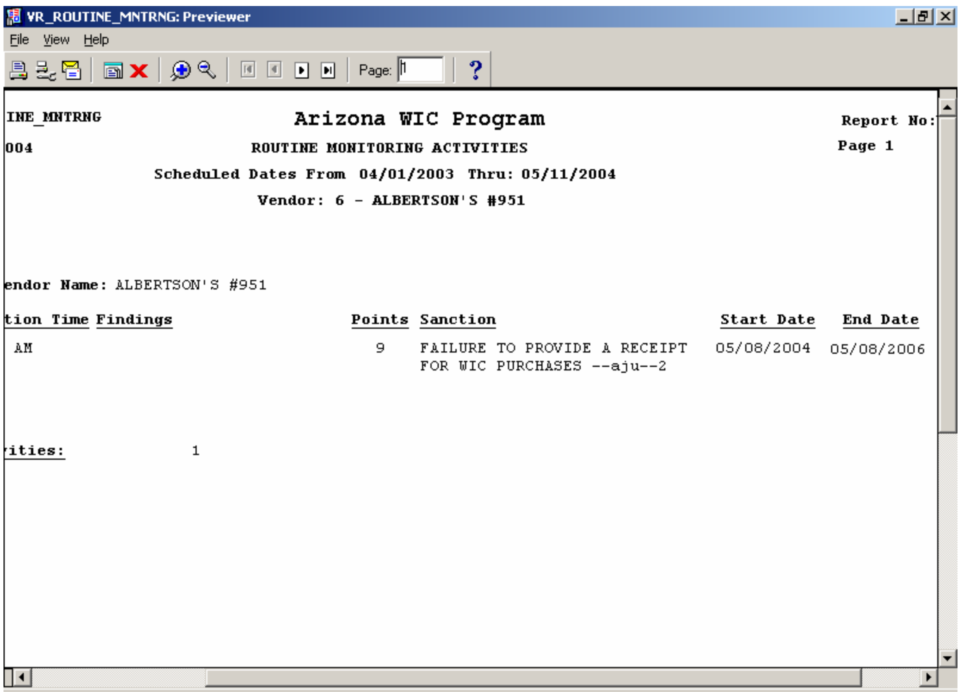


Figure 110 - Sample of Routine Monitoring Activities Report

Figure 109 - Routine Monitoring Activities

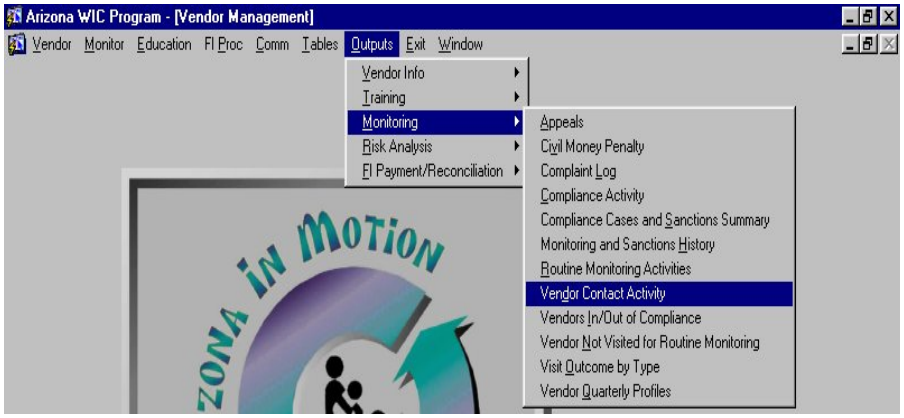
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Vendor - The user may select the Vendor to be queried on from the list of values.
Owner - The user may select the Owner to be queried on from the list of values.
Completed Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Vendor Contact Activity Report

To Produce a Vendor Contact Activity Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Vendor Contact Activity as shown below:



The Vendor Contact Activity parameter window is displayed:

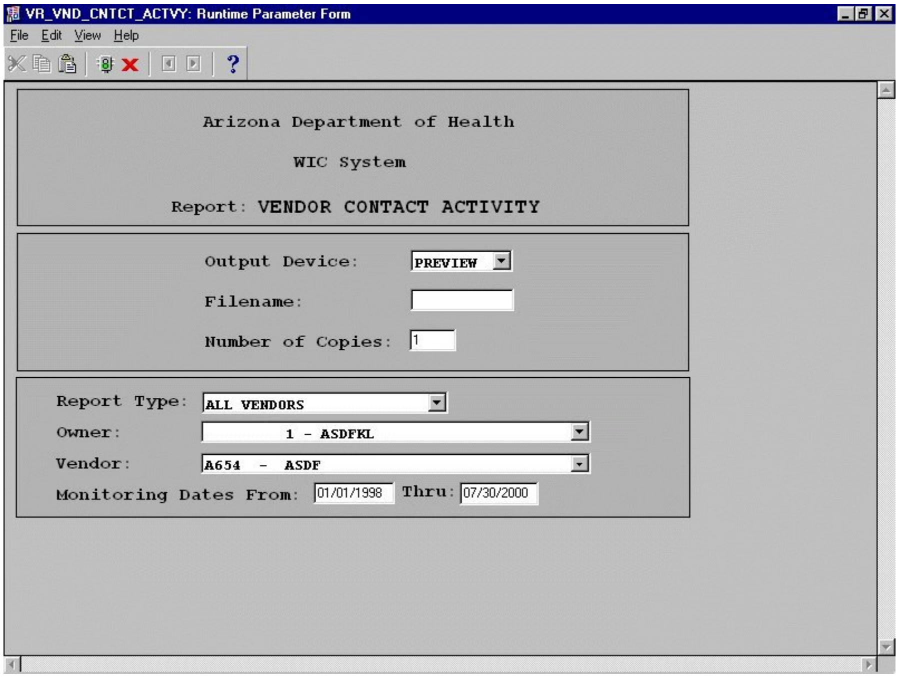


Figure 111 - Vendor Contact Activity

Creating a Vendor Contact Activity Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Select an owner or vendor from their respective drop down lists depending on the report type.
6. Type in a monitoring date from and thru in standard (MM/DD/YYYY) format.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

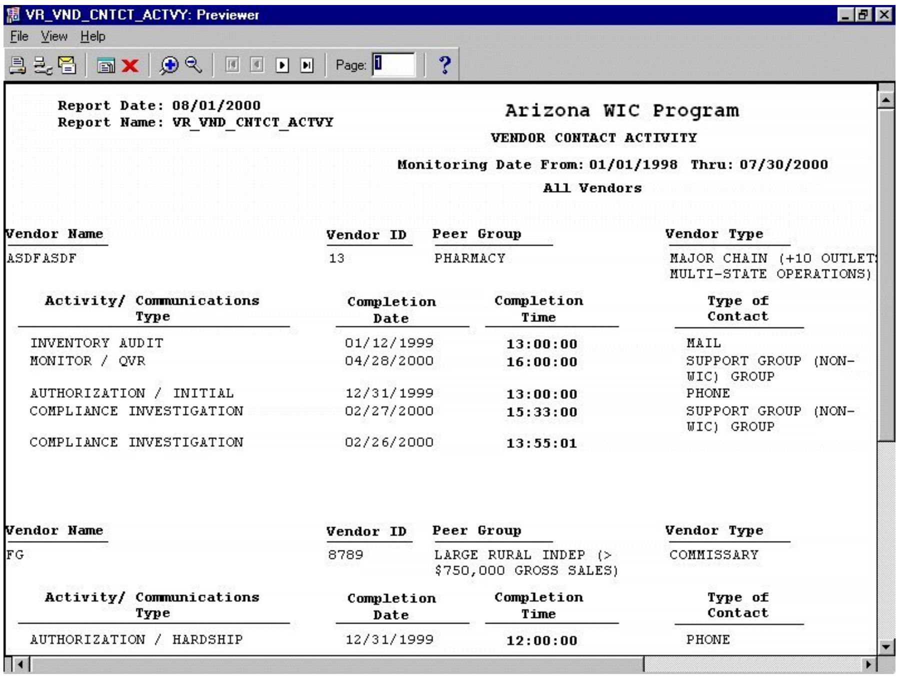


Figure 112 - Sample of Vendor Contact Activity Report

Figure 111 - Vendor Contact Activity

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.
Monitoring Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Vendors In/Out of Compliance Report

To Produce a Vendors In/Out of Compliance Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Vendors In/Out of Compliance as shown below:

The Vendors In/Out of Compliance parameter window is displayed:

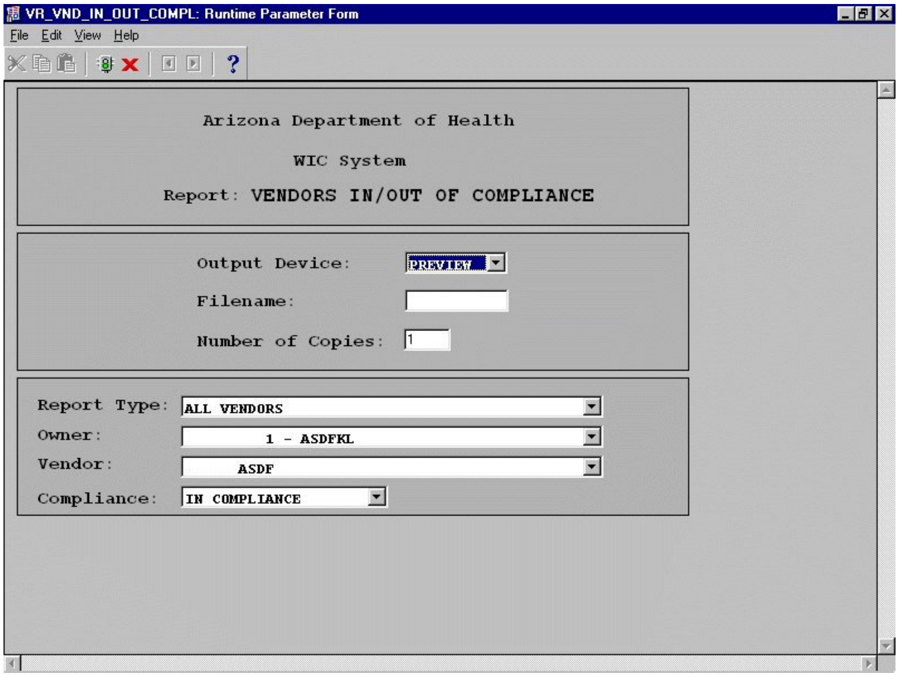
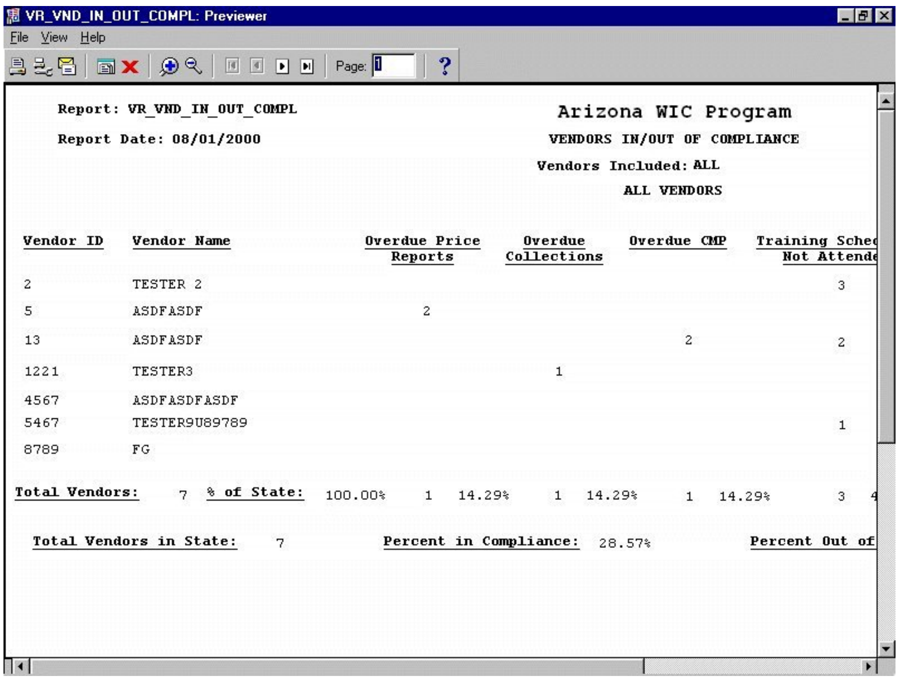


Figure 113 - Vendors In/Out of Compliance

Creating a Vendors In/Out of Compliance Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Choose an owner from the drop down list.
6. Select a vendor form the drop down list.
7. Select the type of compliance from the drop down list.
8. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Vendor ID	Vendor Name	Overdue Price Reports	Overdue Collections	Overdue CMP	Training Sche Not Attende
2	TESTER 2				3
5	ASDFASDF	2			
13	ASDFASDF			2	2
1221	TESTER3		1		
4567	ASDFASDFASDF				
5467	TESTER9U89789				1
8789	FG				

Total Vendors: 7 % of State: 100.00% 1 14.29% 1 14.29% 1 14.29% 3 4

Total Vendors in State: 7 Percent in Compliance: 28.57% Percent Out of

Figure 114 - Sample of Vendors In/Out of Compliance Report

Figure 113 **-** *Vendors In/Out of Compliance*

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors in compliance, or all Vendors out of compliance.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.
Compliance - The user may select the Vendors in compliance, out of compliance, or all.

Producing a Vendors Not Visited for Routine Monitoring Report

To Produce a Vendors Not Visited for Routine Monitoring Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Vendors Not Visited Routine Monitoring as shown below:

The Vendors Not Visited Routine Monitoring parameter window is displayed:

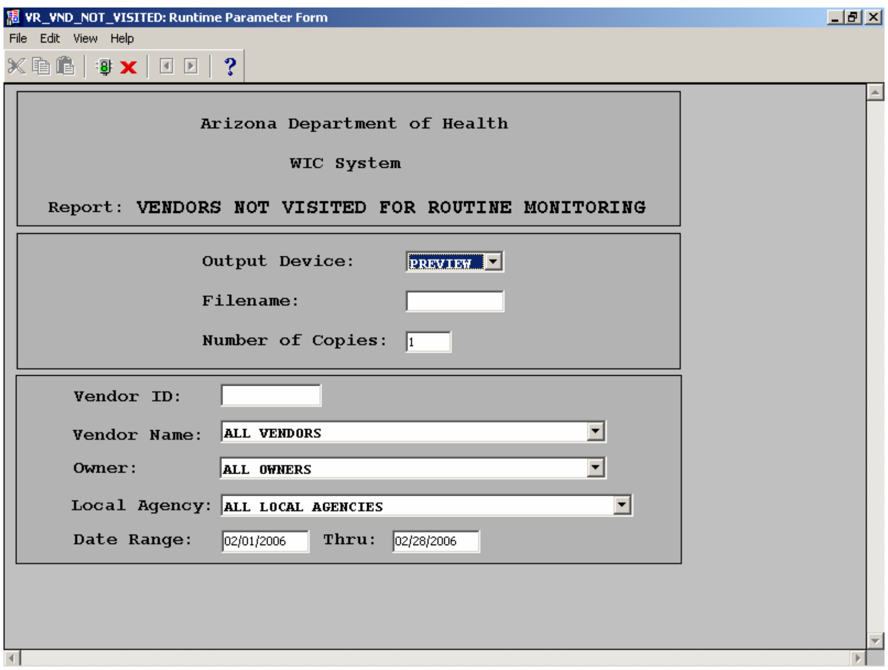
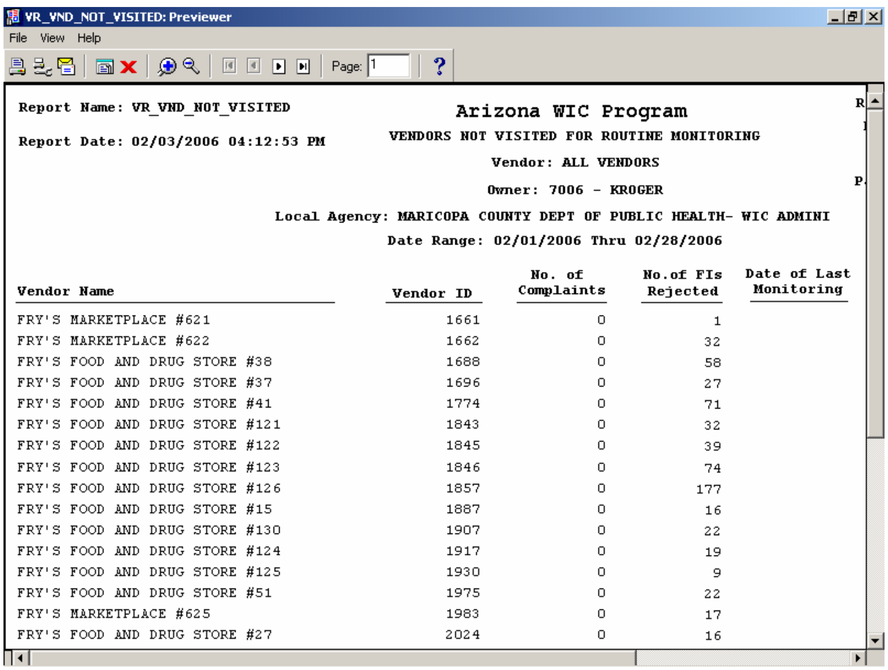


Figure 115 - Vendors Not Visited Routine Monitoring

Creating a Vendors Not Visited Routine Monitoring Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If choosing to run the report based on the default selections, then click the green light icon to bring up the preview screen shown below.
5. Otherwise, enter the Vendor Id and/or select the Vendor Name, and/or select an Owner, and/or a Local Agency from the List of Values (LOV) buttons.
6. The date range defaults to the current month. Enter a new date range to produce a specified report.
7. If Preview was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Report Name: VR_VND_NOT_VISITED
Report Date: 02/03/2006 04:12:53 PM

Arizona WIC Program
VENDORS NOT VISITED FOR ROUTINE MONITORING
Vendor: ALL VENDORS
Owner: 7006 - KROGER
Local Agency: MARICOPA COUNTY DEPT OF PUBLIC HEALTH- WIC ADMINI
Date Range: 02/01/2006 Thru 02/28/2006

Vendor Name	Vendor ID	No. of Complaints	No.of FIs Rejected	Date of Last Monitoring
FRY'S MARKETPLACE #621	1661	0	1	
FRY'S MARKETPLACE #622	1662	0	32	
FRY'S FOOD AND DRUG STORE #38	1688	0	58	
FRY'S FOOD AND DRUG STORE #37	1696	0	27	
FRY'S FOOD AND DRUG STORE #41	1774	0	71	
FRY'S FOOD AND DRUG STORE #121	1843	0	32	
FRY'S FOOD AND DRUG STORE #122	1845	0	39	
FRY'S FOOD AND DRUG STORE #123	1846	0	74	
FRY'S FOOD AND DRUG STORE #126	1857	0	177	
FRY'S FOOD AND DRUG STORE #15	1887	0	16	
FRY'S FOOD AND DRUG STORE #130	1907	0	22	
FRY'S FOOD AND DRUG STORE #124	1917	0	19	
FRY'S FOOD AND DRUG STORE #125	1930	0	9	
FRY'S FOOD AND DRUG STORE #51	1975	0	22	
FRY'S MARKETPLACE #625	1983	0	17	
FRY'S FOOD AND DRUG STORE #27	2024	0	16	

Figure 116 - Sample of Vendors Not Visited Routine Monitoring Report

Figure 115 - Vendors Not Visited Routine Monitoring

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Vendor ID- This field is a user entered id parameter that specifies a particular vendor.
Vendor Name – The field defaults to "All Vendors", but the user may limit Vendors by selecting a Vendor Name from a list of values.
Owner - The field defaults to "All Owners", but the user may limit Vendors by selecting an Owner from a list of values.
Local Agency - The field defaults to "All Local Agencies", but the user may select a Local Agency to be queried on from the list of values.

Date Range - The date range defaults to the current month, but the user may modify the date range.
Thru – The end date entered to complete the date range.

Background Process(es)

A date displays for the column named "date of last monitoring" when the activity for monitoring is specifically "routine monitoring" only.

Producing a Visit Outcome By Type Report

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Visit Outcome by Type as shown below:

The Visit Outcome by Type parameter window is displayed:

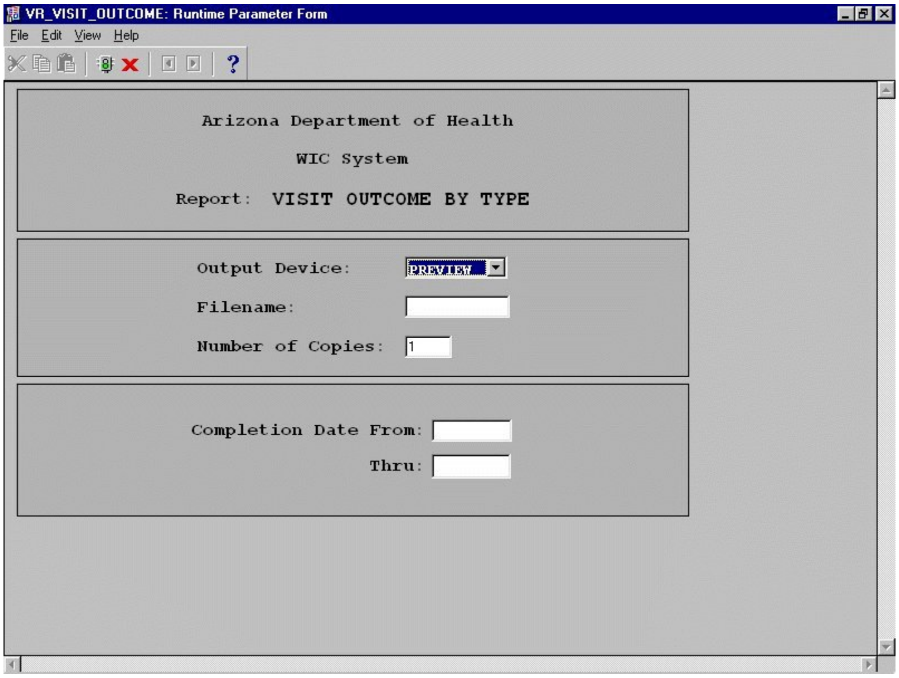


Figure 117 - Visit Outcome by Type

Creating a Visit Outcome by Type Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in the completion date from and thru in their respective fields.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

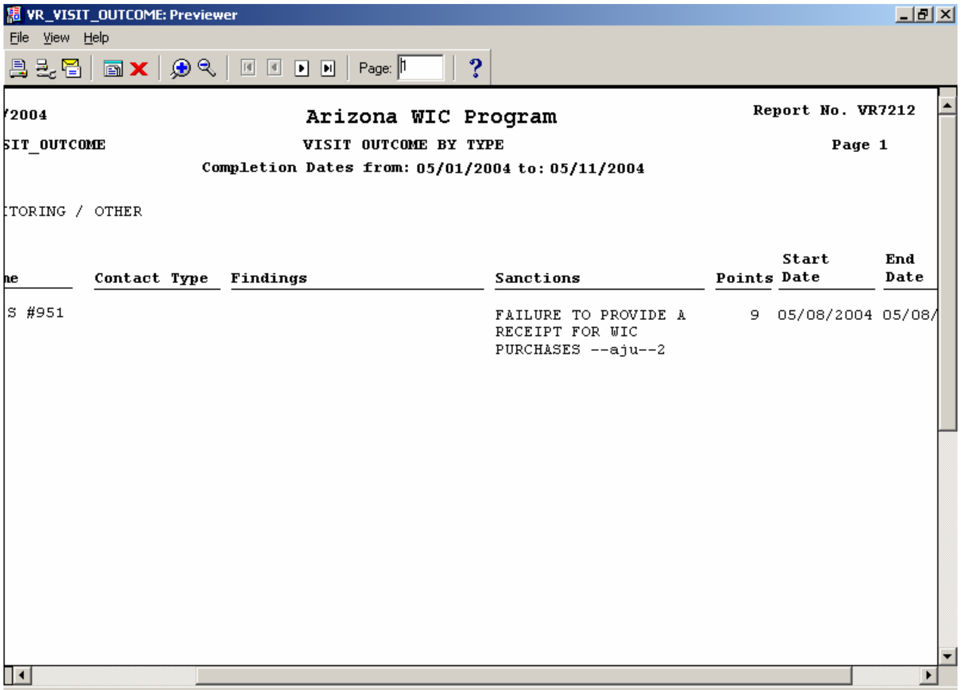


Figure 118 - Sample of Visit Outcome by Type Report

Figure 117 - Visit Outcome by Type

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Completion Date From - The beginning date for the range of completion dates to reported upon.
Thru - The ending date for the range of completion dates to be reported upon.

Producing a Vendor Quarterly Profiles Report

To Produce a Vendor Quarterly Profiles Report:

1. Click on Outputs from the menu bar.
2. Click on Monitoring.
3. Click on Vendor Quarterly Profiles as shown below:

The Vendor Quarterly Profiles parameter window is displayed:

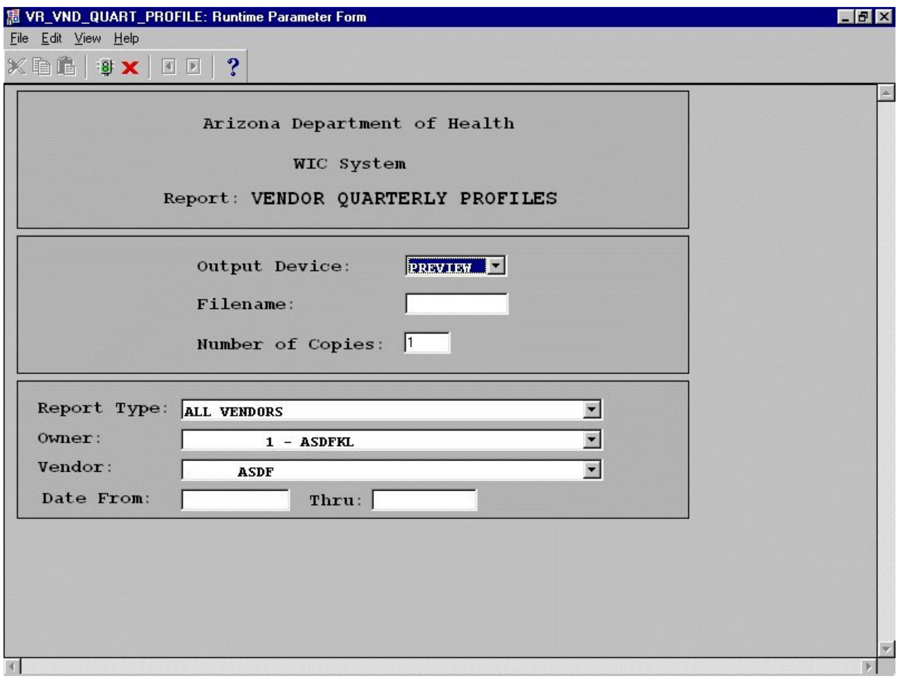


Figure 119 - Vendor Quarterly Profiles

Creating a Vendor Quarterly Profiles Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type from the drop down list.
5. Select an owner or vendor from their respective drop down lists depending on the report type.
6. Fill in the date from and thru fields in standard (MM/DD/YYYY) format.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

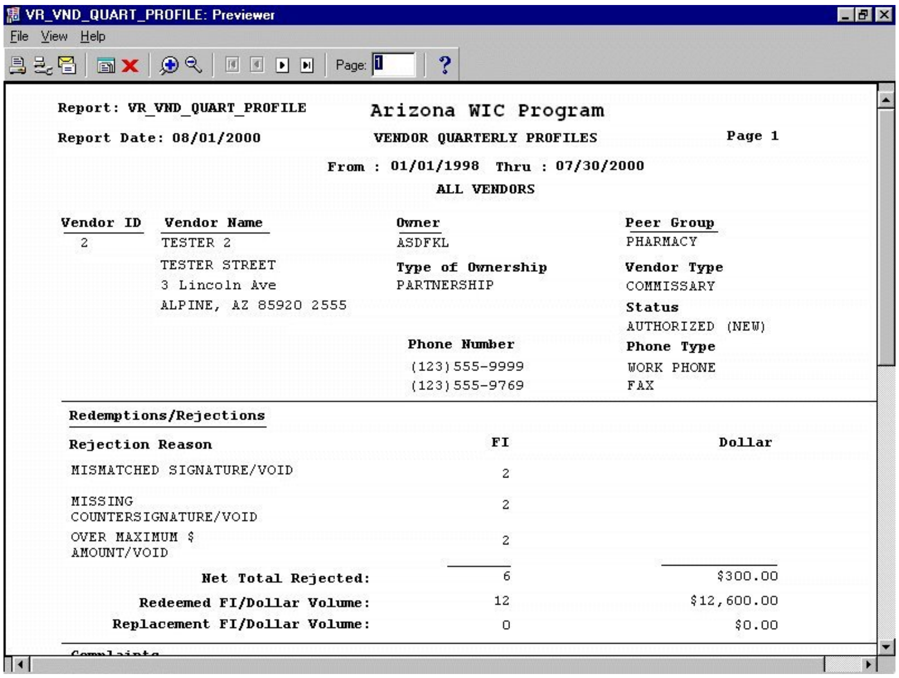


Figure 120 - Sample of Vendor Quarterly Profiles Report

Figure 119 - Vendor Quarterly Profiles

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may select the number of Vendors to be retrieved: all Vendors, all Vendors for an Owner, or one Vendor.
Owner - The user may select the Owner to be queried on from the list of values.
Vendor - The user may select the Vendor to be queried on from the list of values.
Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Exception Redemption Analysis Report

To Produce an Exception Redemption Analysis Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Exception Redemption Analysis as shown below:

The Exception Redemption Analysis parameter window is displayed:

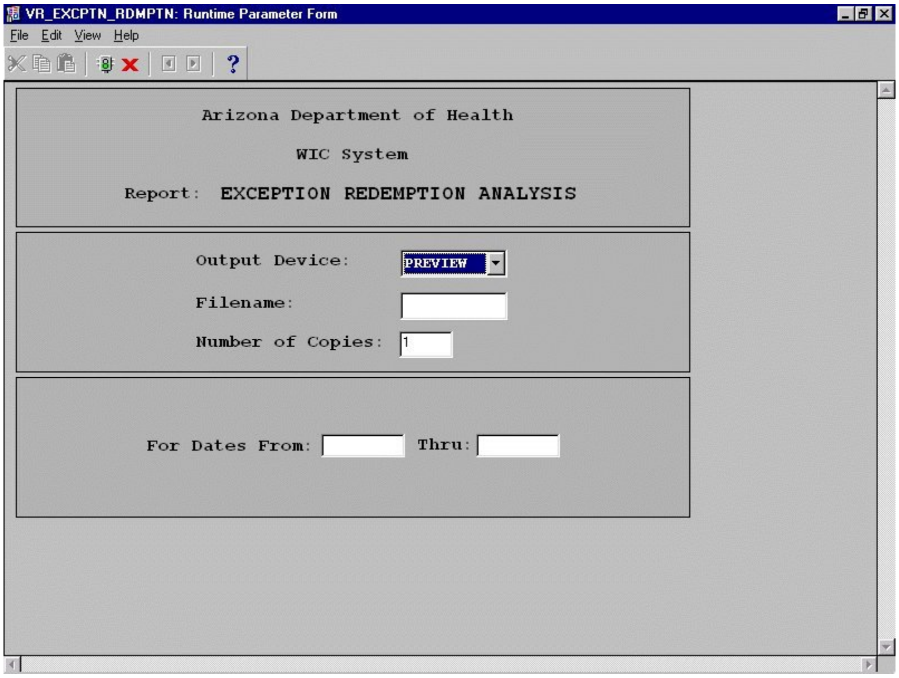


Figure 121 - Exception Redemption Analysis Criteria

Creating a Exception Redemption Analysis Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Fill in the for from and thru dates fields in standard (MM/DD/YYYY) format.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

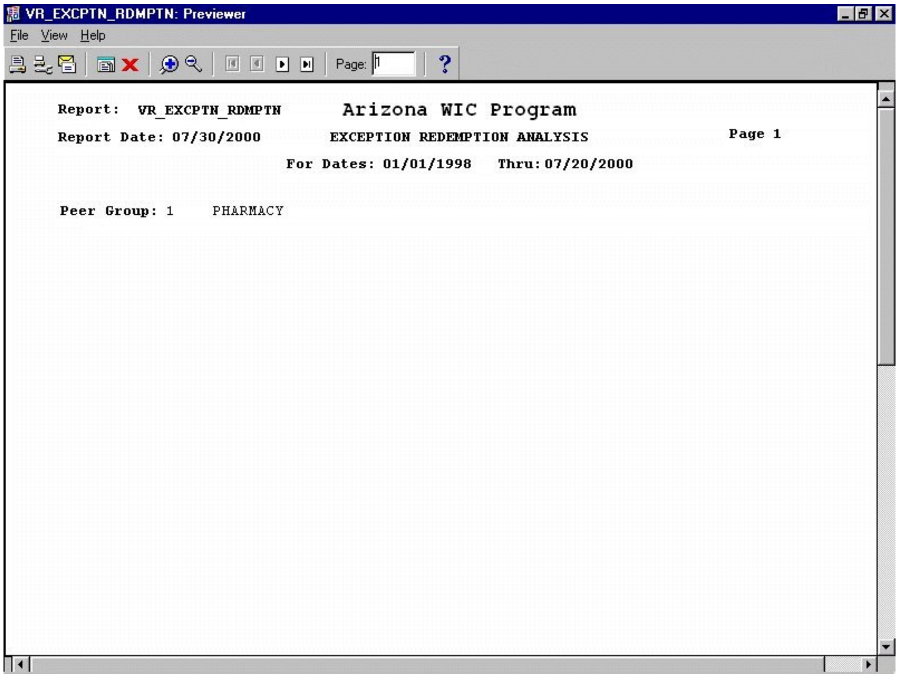


Figure 122 - Sample of Exception Redemption Analysis Report

Figure 121 - Exception Redemption Analysis Criteria

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
For Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a High Average FI Cost Report

To Produce a High Average FI Cost Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on High Average FI Cost as shown below:

The High Average FI Cost parameter window is displayed:

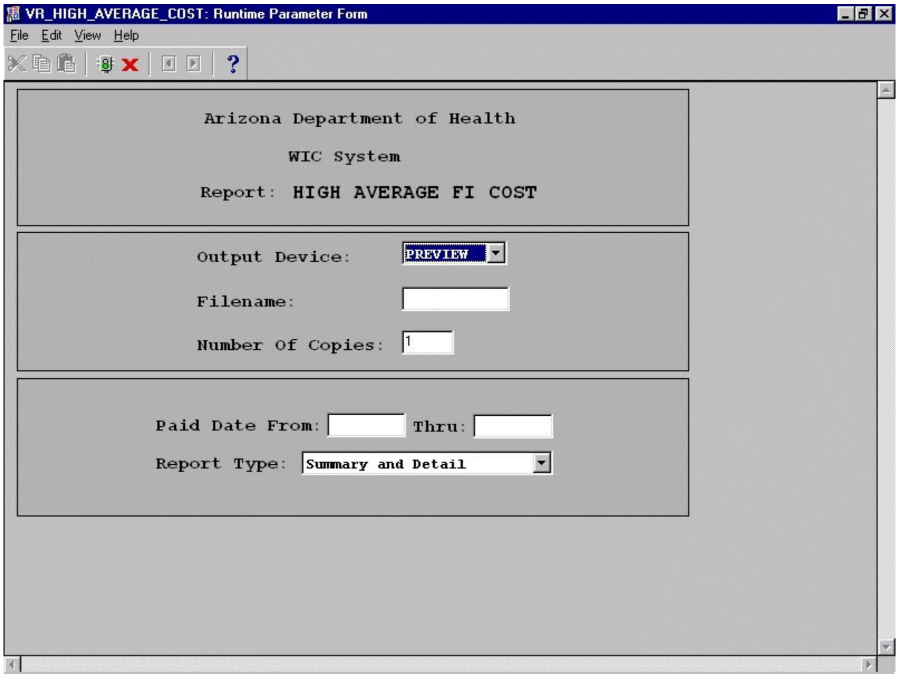


Figure 123 - High Average FI Cost Criteria

Creating a High Average FI Cost Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Fill in the paid date from and thru fields with dates in the standard (MM/DD/YYYY) format.
5. Select the report type using the drop down list.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

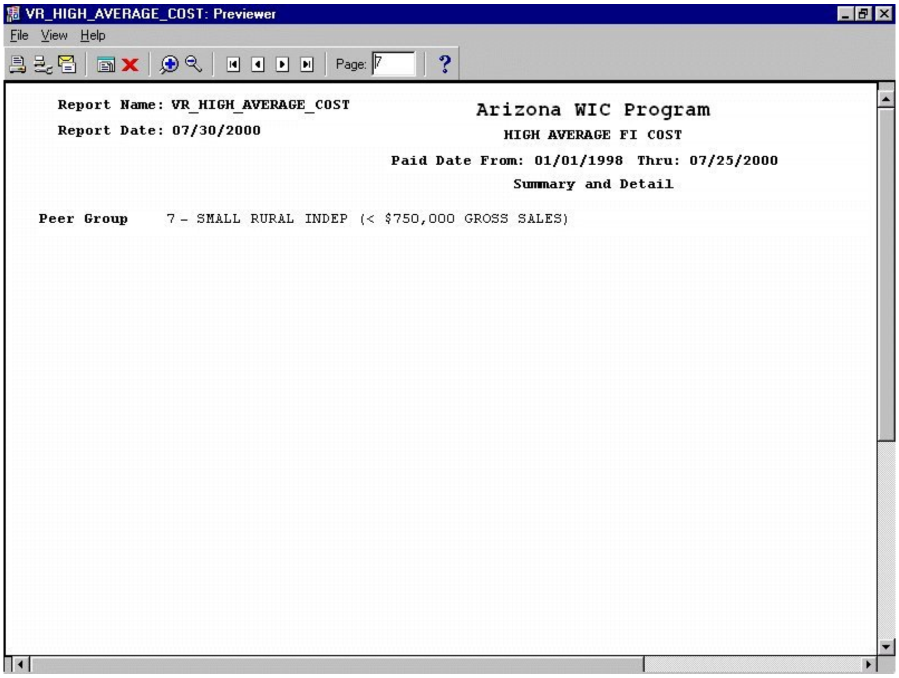


Figure 124 - Sample of High Average FI Cost Report

Figure 123 - High Average FI Cost Criteria

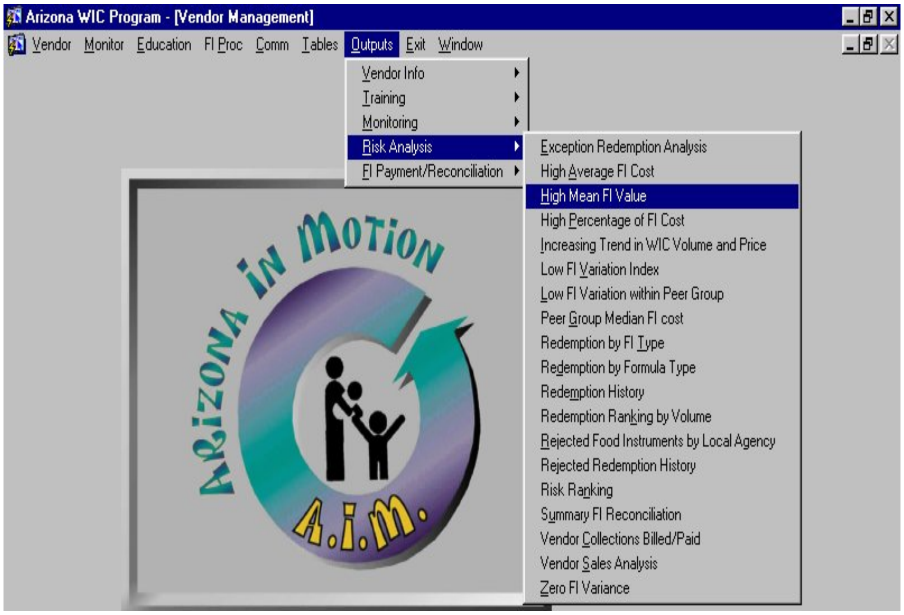
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Paid Date From - The beginning date of the data queried.
Thru - The ending date of the data queried.
Report Type - Allows the user to select a summary or a detail of summary report.

Producing a High Mean FI Value Report

To Produce a High Mean FI Value Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on High Mean FI Value as shown below:



The High Mean FI Value parameter window is displayed:

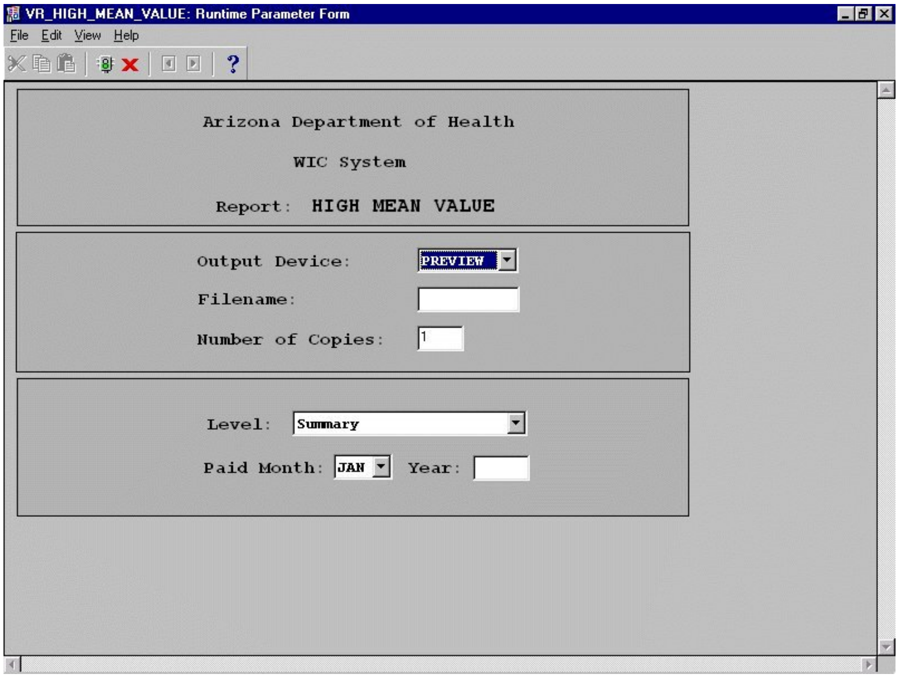


Figure 125 - High Mean FI Value

Creating a High Mean FI Value Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the level of the report from the drop down list.
5. Select the paid month from the drop down list.
6. Type in a 4 digit year in the year field.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

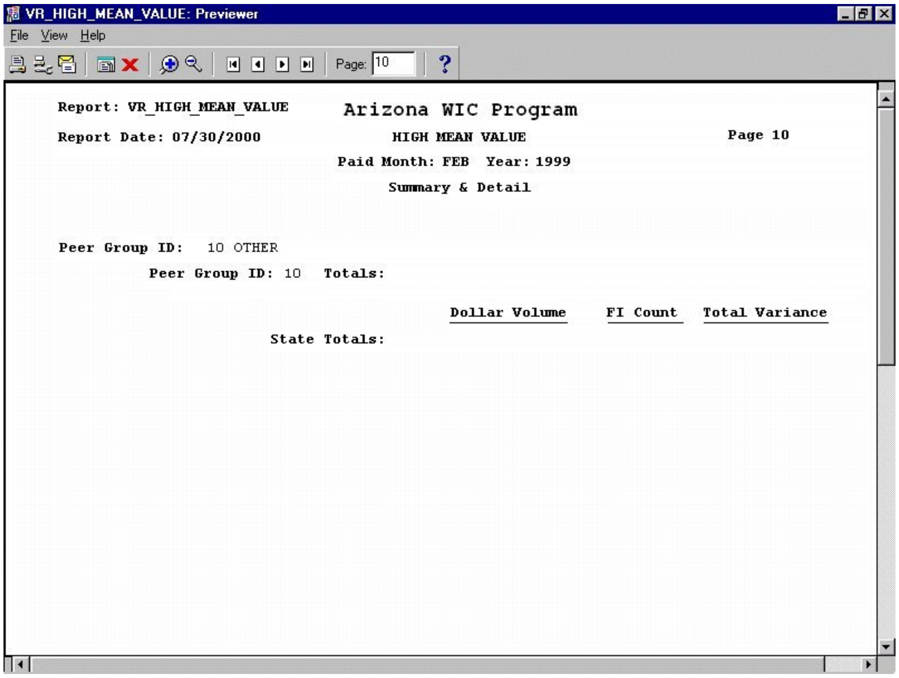


Figure 126 - Sample of High Mean FI Value Report

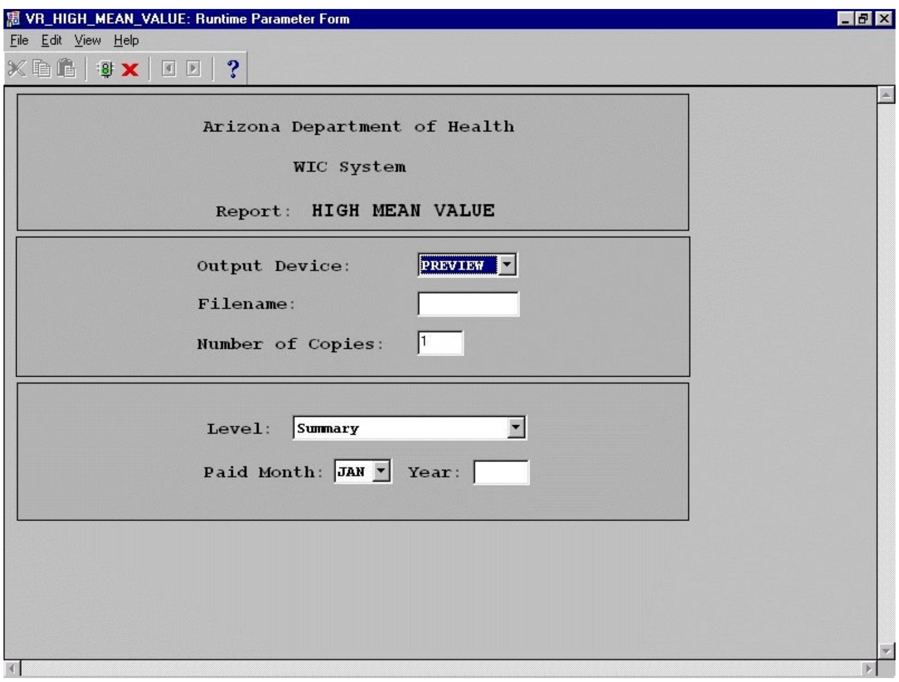


Figure 125 - High Mean FI Value

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Level - Requires the user to select a summary or a detail of summary report.
Paid Month - The month of the data queried.
Year - The year of the data queried.

Producing a High Percentage of FI Cost Report

To Produce a High Percentage of FI Cost Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on High Percentage of FI Cost as shown below:

The High Percentage of FI Cost parameter window is displayed:

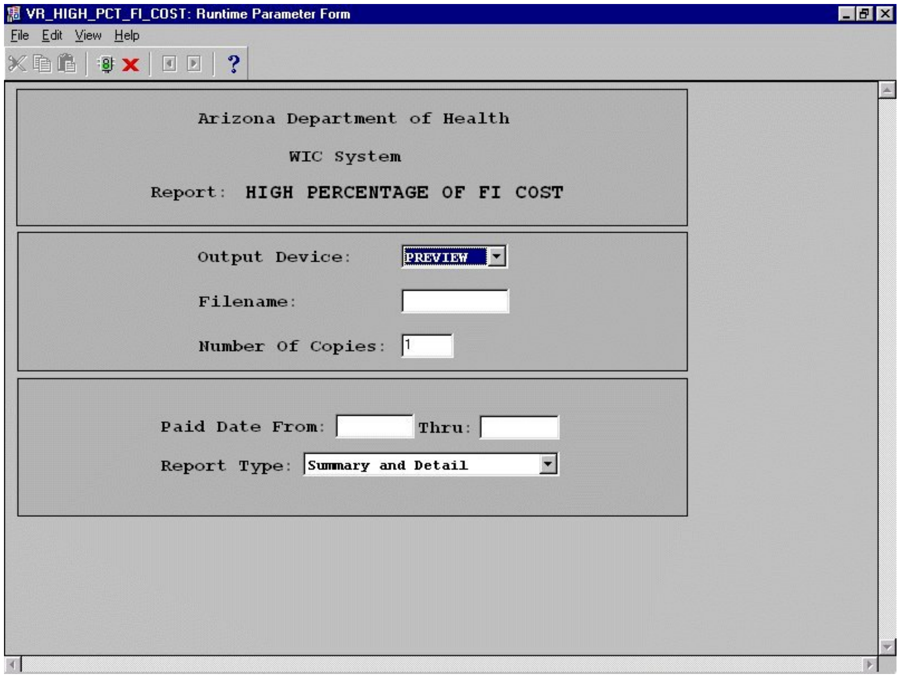


Figure 127 - High Percentage of FI Cost

Creating a High Percentage of FI Cost Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Fill in the paid date from and thru fields with dates in the standard (MM/DD/YYYY) format.
5. Select the report type using the drop down list.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

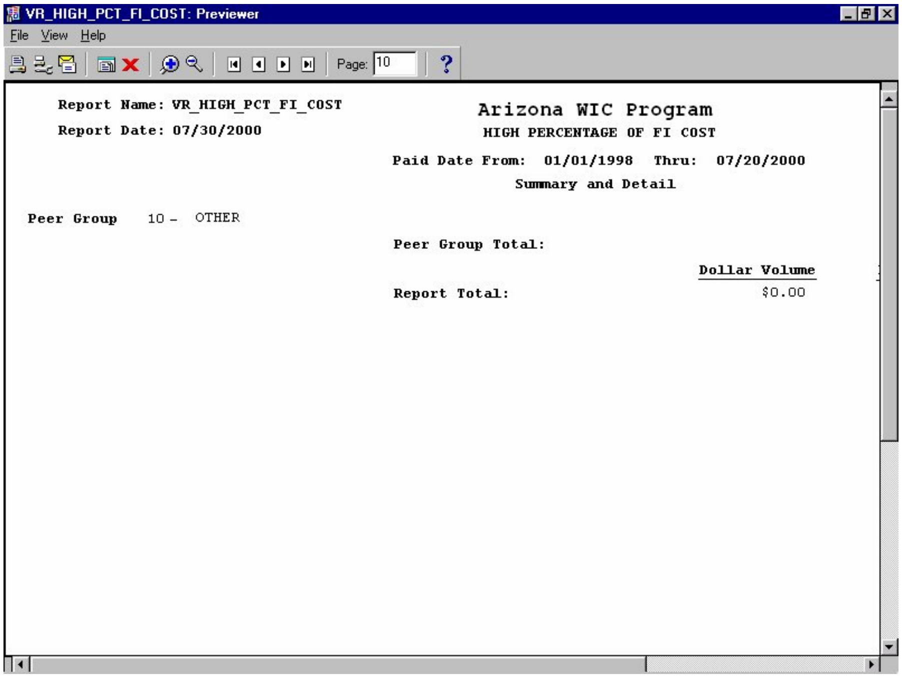


Figure 128 - Sample of High Percentage of FI Cost Report

Figure 127 - High Percentage of FI Cost

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Paid Date From - The beginning date of the data queried.
Thru - The ending date of the data queried.
Report Type - Allows the user to select a summary or a detail of summary report.

Producing a Increasing Trend in WIC Volume & Price Report

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Increasing Trend in WIC Volume & Price as shown below:

The Increasing Trend in WIC Volume & Price parameter window is displayed:

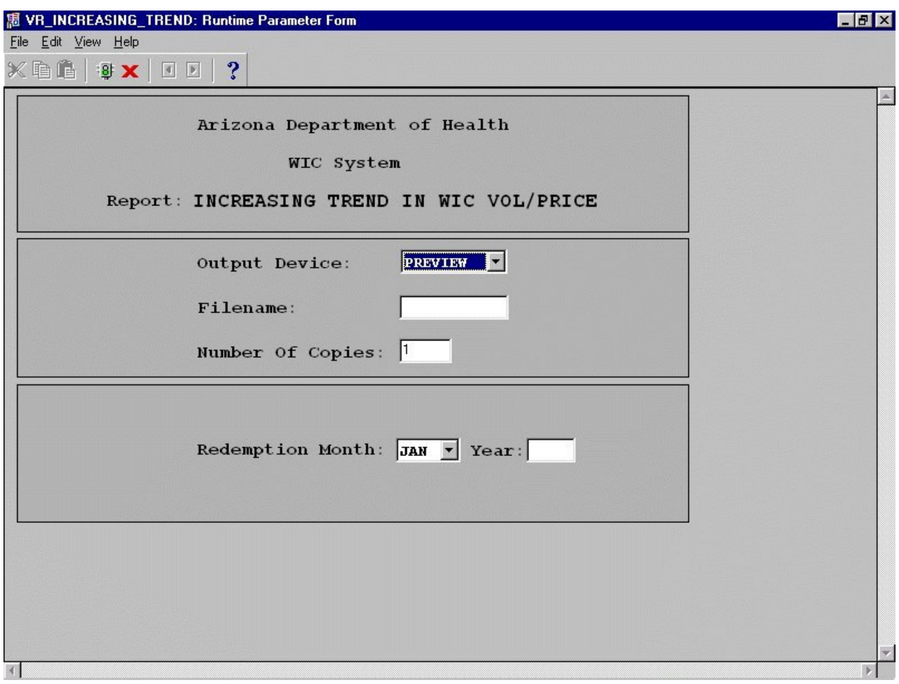


Figure 129 - Increasing Trend in WIC Volume & Price

Creating a Increasing Trend in WIC Volume & Price Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the redemption month from the drop down list.
5. Type in a 4 digit year in the year field.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

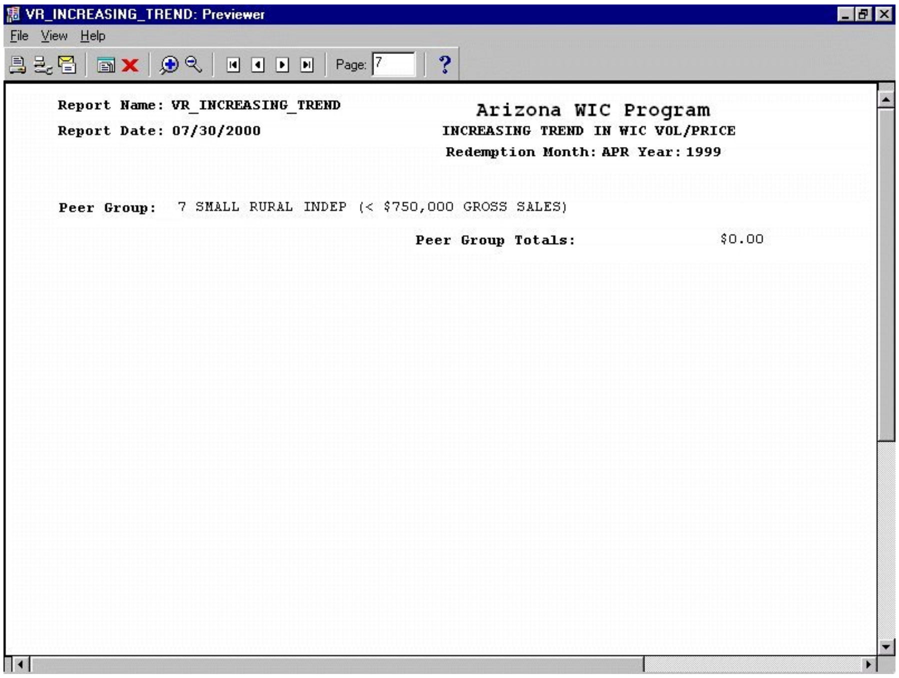


Figure 130 - Sample of Increasing Trend in WIC Volume & Price Report

Figure 129 - Increasing Trend in WIC Volume & Price

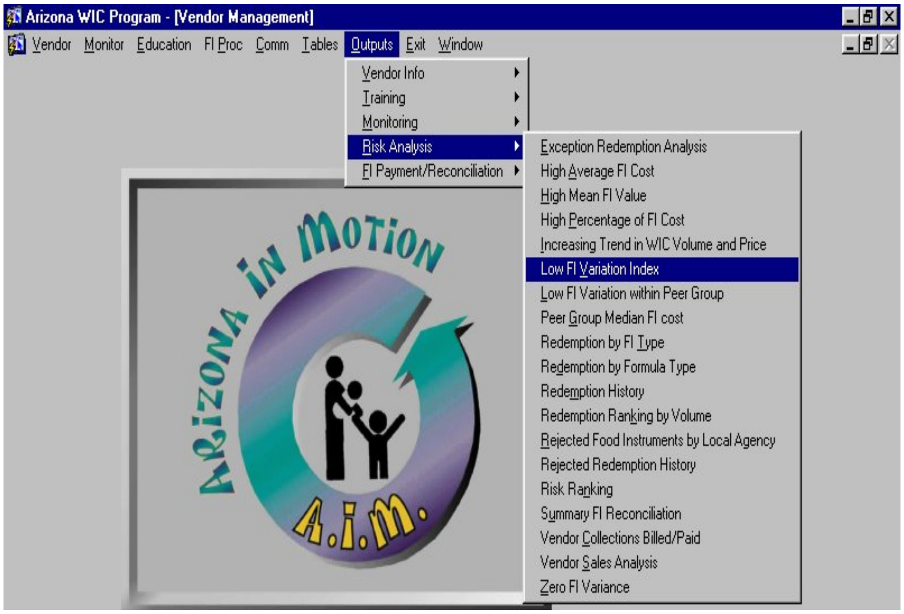
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption Month - Enter redemption month here. The report will retrieve data for this month and the three months prior. If the redemption month chosen is a recent month, the first month on the report may show a partial redemption amount.
Year - The year of the data queried.

Producing a Low FI Variation Index Report

To Produce a Low FI Variation Index Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Low FI Variation Index as shown below:



The Low FI Variation Index parameter window is displayed:

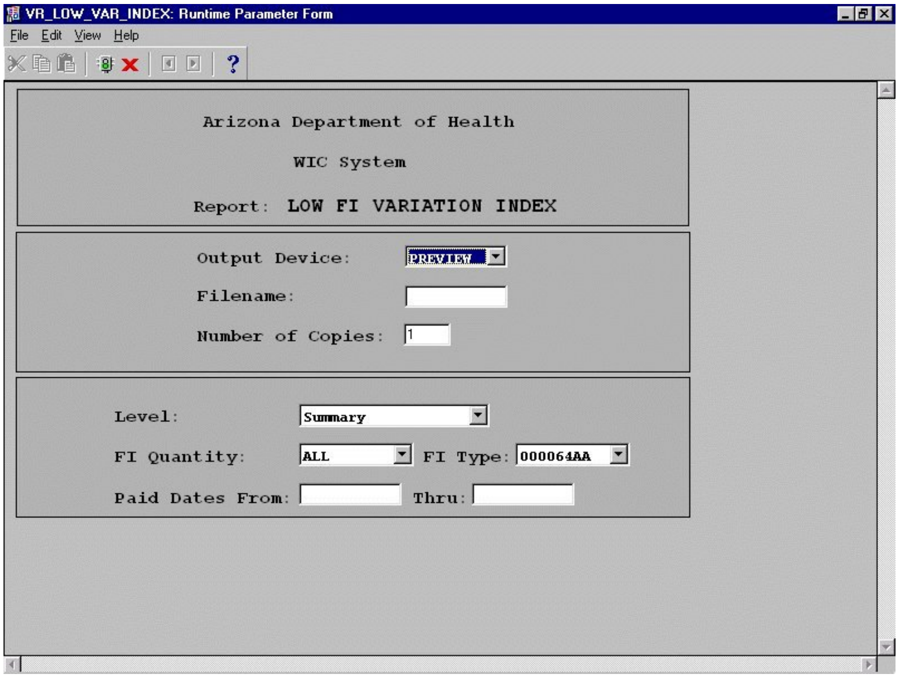


Figure 131 - Low FI Variation Index

Creating a Low FI Variation Index Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the level from the drop down list.
5. Select the FI quantity from the drop down list.
6. Select the FI type from the drop down list.
7. Fill in the paid date from and thru fields with dates in the standard (MM/DD/YYYY) format.
8. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

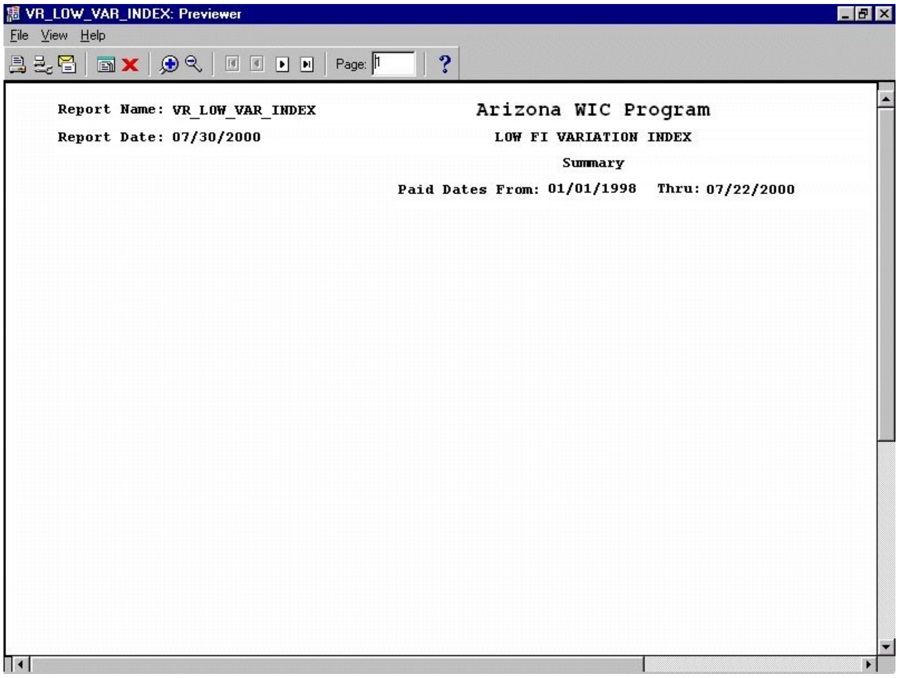


Figure 132 - Sample of Low FI Variation Index Report

Figure 131 - Low FI Variation Index

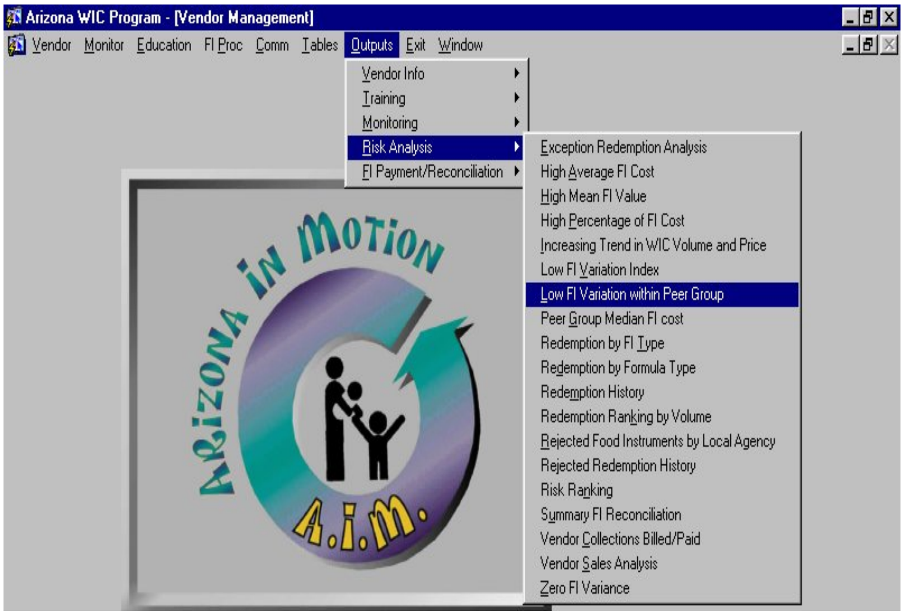
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Level - Allows the user to select a summary or a detail of summary report.
FI Quantity - The user may select the number of FI's to be retrieved: all FI types, or one FI type.
FI Type - The user may select the FI type to be queried on from the list of values.
Paid Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Low FI Variance within Peer Group Report

To Produce a Low FI Variance within Peer Group Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Low FI Variance within Peer Group as shown below:



The Low FI Variance within Peer Group parameter window is displayed:

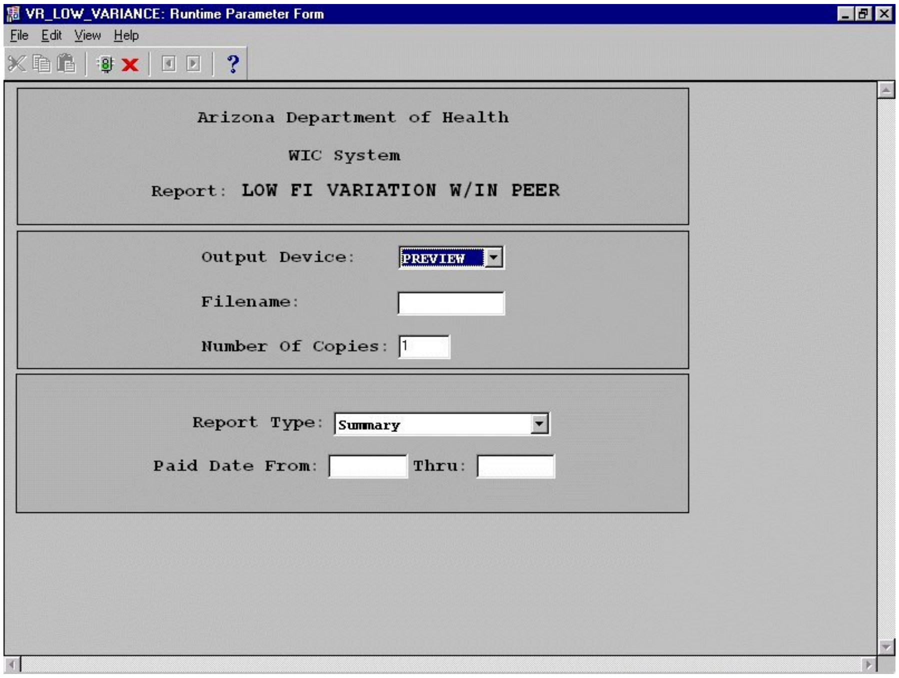


Figure 133 - Low FI Variance within Peer Group

Creating a Low FI Variance within Peer Group Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type using the drop down list.
5. Fill in the paid date from and thru fields with dates in the standard (MM/DD/YYYY) format.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

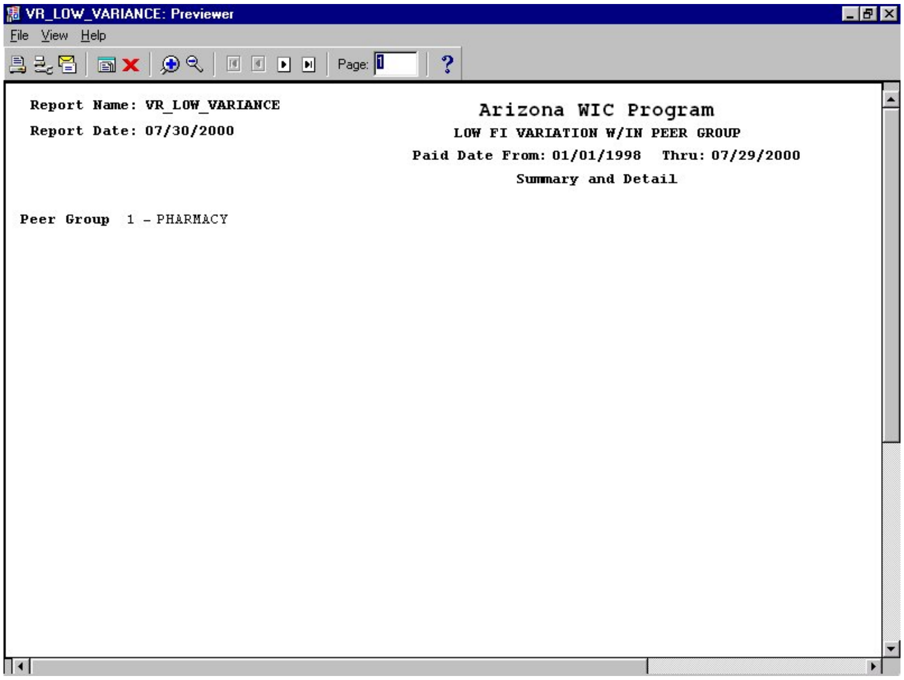


Figure 134 - Sample of Low FI Variance within Peer Group Report

Figure 133 - Low FI Variance within Peer Group

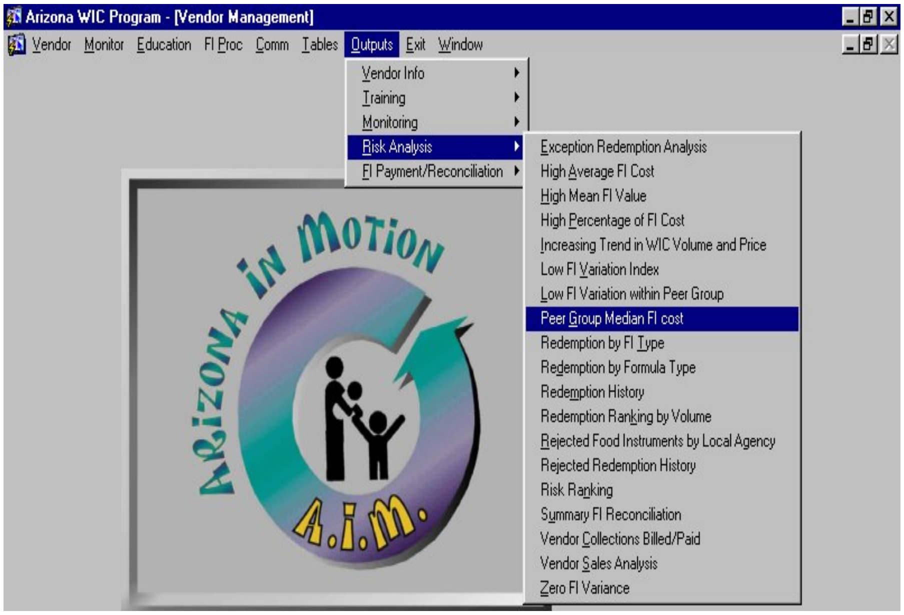
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - Allows the user to select a summary or a detail of summary report.
Paid Date From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Peer Group Median FI Cost Report

To Produce a Peer Group Median FI Cost Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Peer Group Median FI Cost as shown below:



The Peer Group Median FI Cost parameter window is displayed:

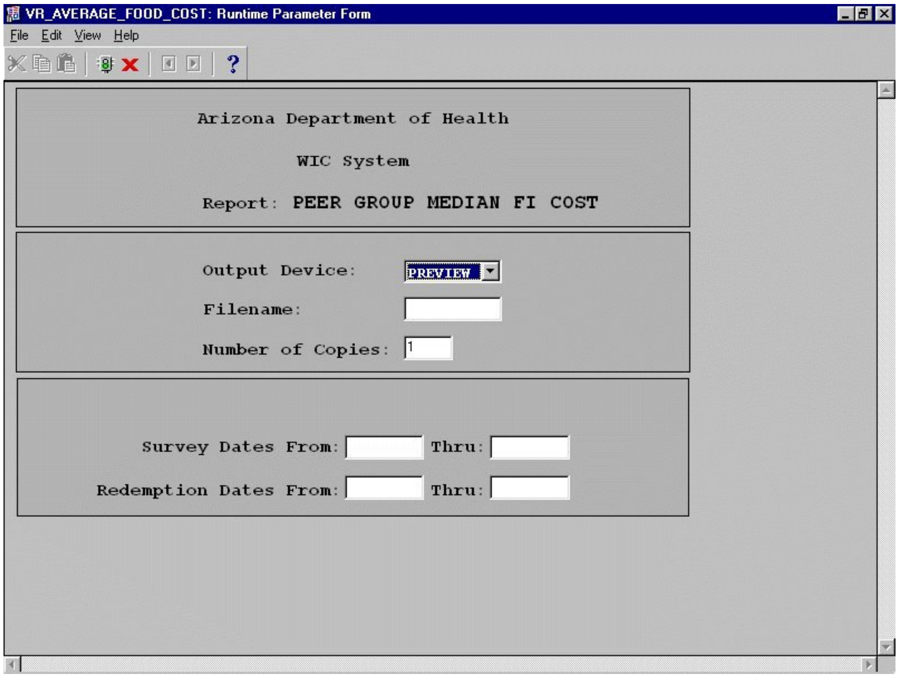
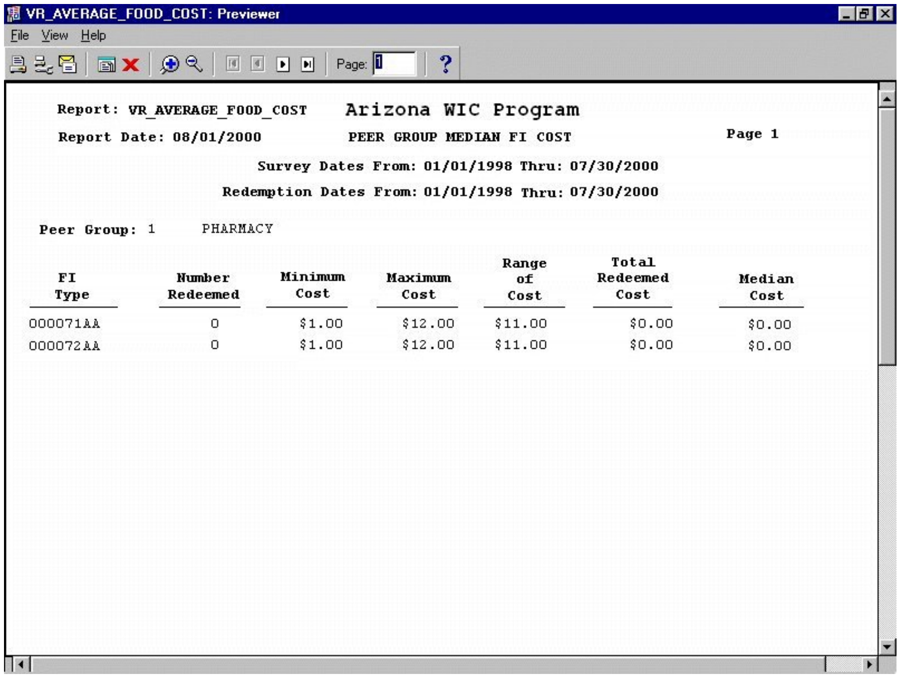


Figure 135 - Peer Group Median FI Cost

Creating a Peer Group Median FI Cost Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in the survey dates from and thru fields with a date in the standard (MM/DD/YYYY) format.
5. Type in the redemption dates from and thru fields with a date in the standard (MM/DD/YYYY) format.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Report: VR_AVERAGE_FOOD_COST   Arizona WIC Program
Report Date: 08/01/2000   PEER GROUP MEDIAN FI COST   Page 1

Survey Dates From: 01/01/1998 Thru: 07/30/2000
Redemption Dates From: 01/01/1998 Thru: 07/30/2000

Peer Group: 1   PHARMACY

FI Type	Number Redeemed	Minimum Cost	Maximum Cost	Range of Cost	Total Redeemed Cost	Median Cost
000071AA	0	$1.00	$12.00	$11.00	$0.00	$0.00
000072AA	0	$1.00	$12.00	$11.00	$0.00	$0.00

Figure 136 - Sample of Peer Group Median FI Cost Report

Figure 135 - Peer Group Median FI Cost

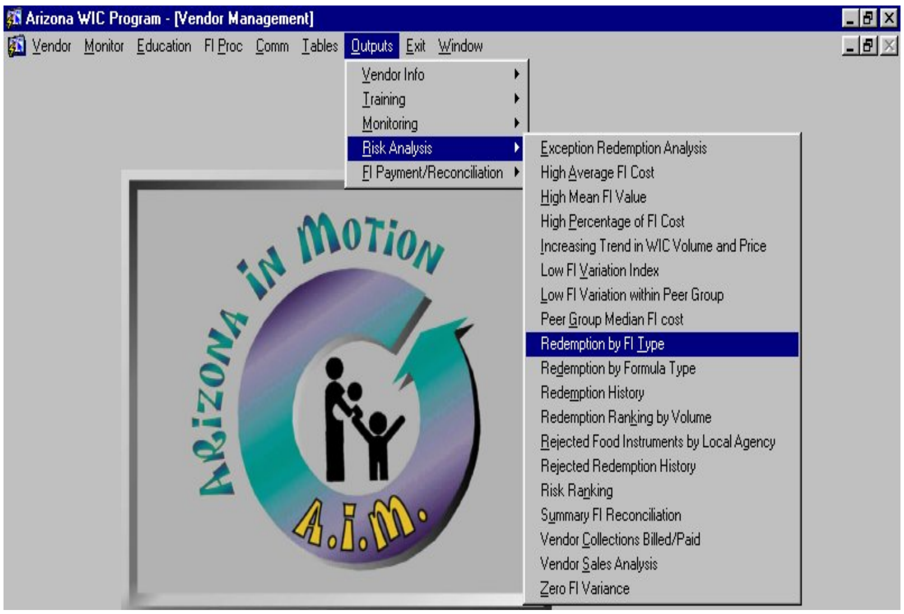
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Survey Dates from - The beginning date of the price survey data queried.
Thru - The ending date of the price survey data queried.
Redeemed Dates from - The beginning date of the redemption data queried.
Thru - The ending date of the redemption data queried.

Producing a Redemption by FI Type Report

To Produce a Redemption by FI Type Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Redemption by FI Type as shown below:



The Redemption by FI Type parameter window is displayed:

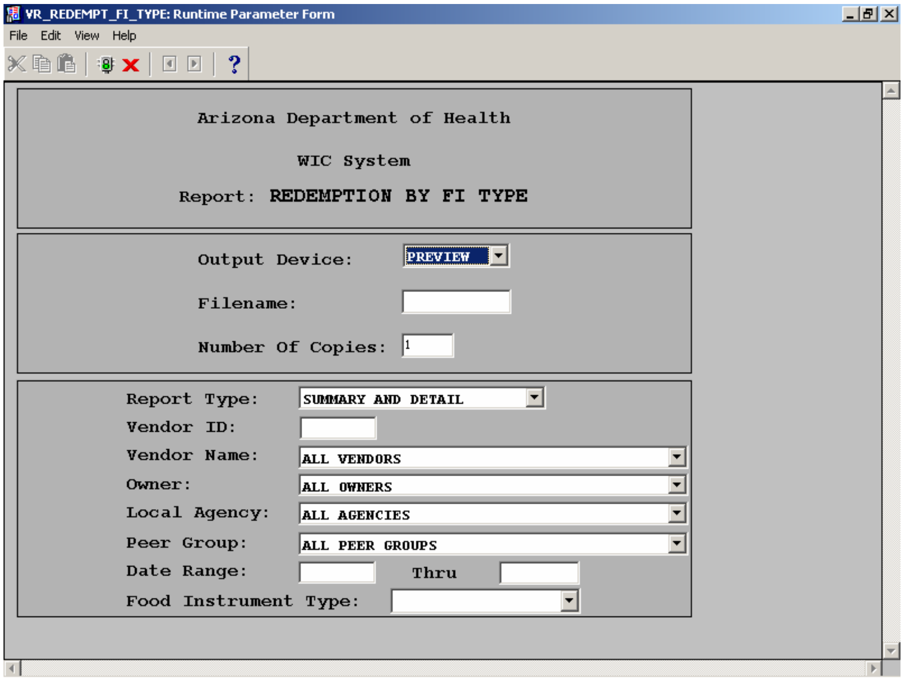
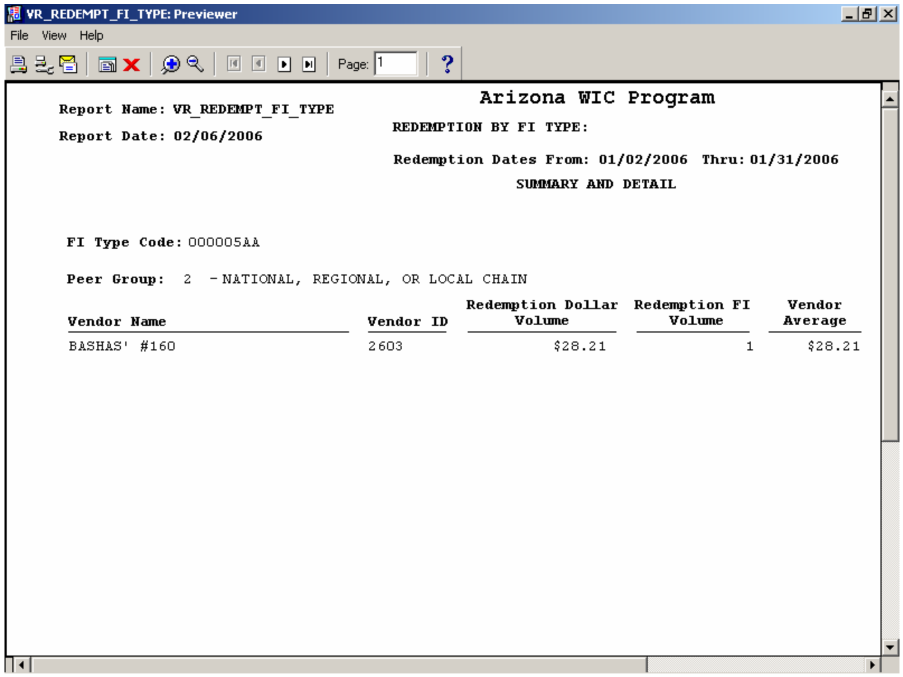


Figure 137 - Redemption by FI Type

Creating a Redemption by FI Type Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type using the drop down list.
5. If choosing to run the report based on the default selections, enter a date range and select a food instrument type, then click the green light icon to bring up the preview screen shown below.
6. Otherwise, enter the Vendor Id and/or select the Vendor Name, and/or select an Owner, and/or a Local Agency, and/or a Peer Group from the List of Values (LOV) buttons.
7. Enter a date range to produce a specific redemption report.
8. Select the Food Instrument Type from the List of Values (LOV) button.
9. If Preview was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Arizona WIC Program

Report Name: VR_REDEMPT_FI_TYPE
Report Date: 02/06/2006

REDEMPTION BY FI TYPE:
Redemption Dates From: 01/02/2006 Thru: 01/31/2006
SUMMARY AND DETAIL

FI Type Code: 000005AA

Peer Group: 2 - NATIONAL, REGIONAL, OR LOCAL CHAIN

Vendor Name	Vendor ID	Redemption Dollar Volume	Redemption FI Volume	Vendor Average
BASHAS' #160	2603	$28.21	1	$28.21

Figure 138 - Sample of Redemption by FI Type Report

Figure 137 - Redemption by FI Type

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - Allows the user to select a summary or a detail of summary report.
Vendor ID - This field is a user entered id parameter that specifies a particular vendor.
Vendor Name – The field defaults to “All Vendors”, but the user may limit Vendors by selecting a Vendor Name from a list of values.
Owner - The field defaults to “All Owners”, but the user may limit Vendors by selecting an Owner from a list of values.
Local Agency - The field defaults to “All Local Agencies”, but the user may select a Local Agency to be queried on from the list of values.
Peer Group - The user may limit Vendors by selecting a Peer Group from a list of values.
Date Range - The user enters the date range for the redemption month specified.
Thru – The end date entered to complete the date range.
Food Instrument Type - The field defaults to a blank field, but the user may limit the Food Instrument Type by selecting an individual food instrument type from the list of values.

Background Process(es)

This report shows redemption amount and volume for each FI type by peer group.

Producing a Redemption by Formula Type Report

To Produce a Redemption by Formula Type Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Redemption by Formula Type as shown below:

The Redemption by Formula Type parameter window is displayed:

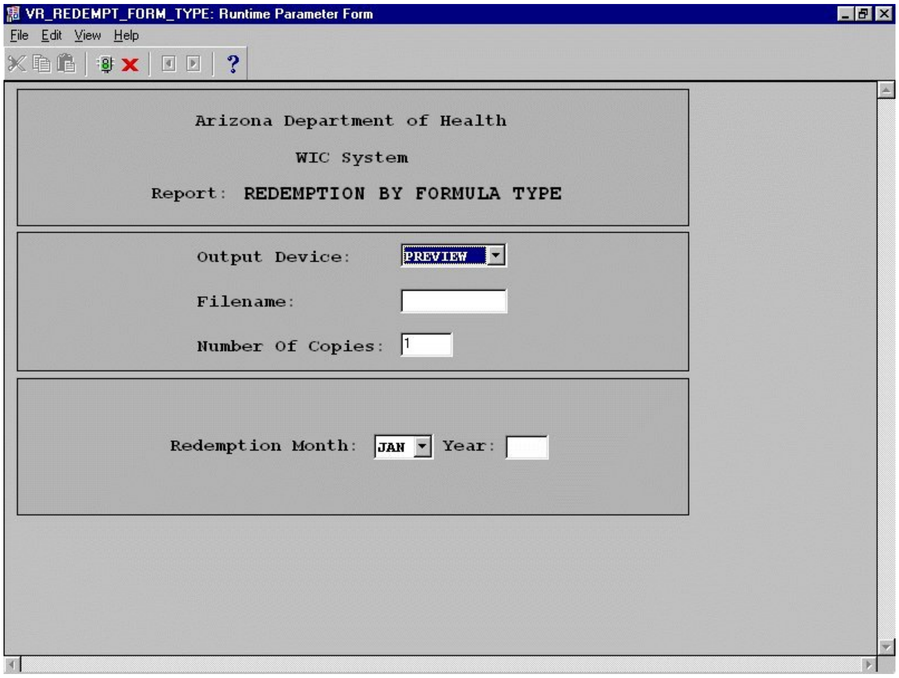


Figure 139 - Redemption by Formula Type

Creating a Redemption by Formula Type Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the redemption month from the drop down list.
5. Type in a 4 digit year in the year field.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

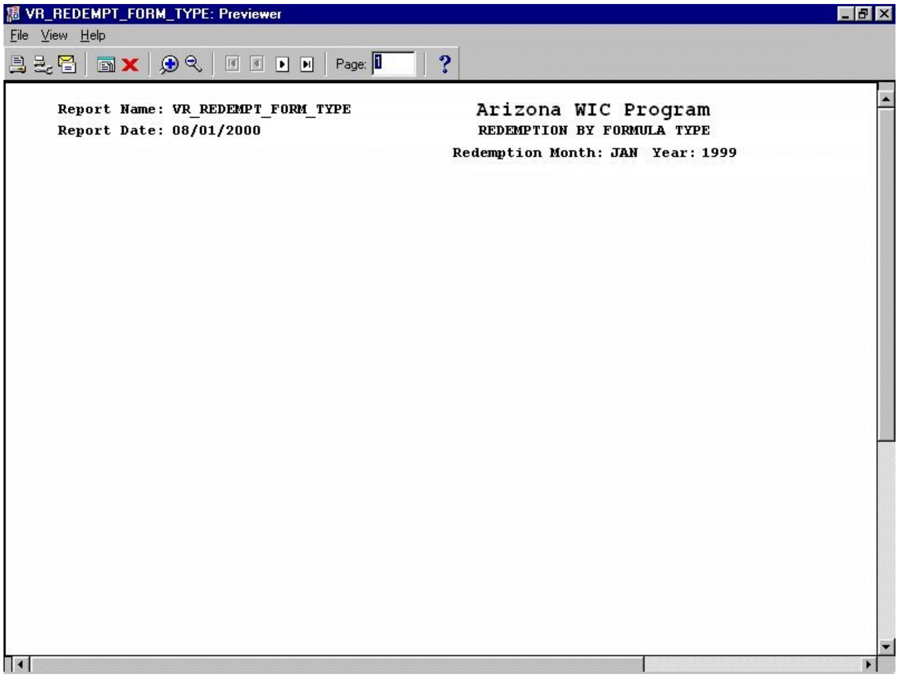


Figure 140 - Sample of Redemption by Formula Type Report

Figure 139 - Redemption by Formula Type

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption Month - The month which will be queried for food instrument reconciliations.
Redemption Year - The year which will be queried for food instrument reconciliations.

Producing a Redemption History Report

To Produce a Redemption History Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Redemption History as shown below:

The Redemption History parameter window is displayed:

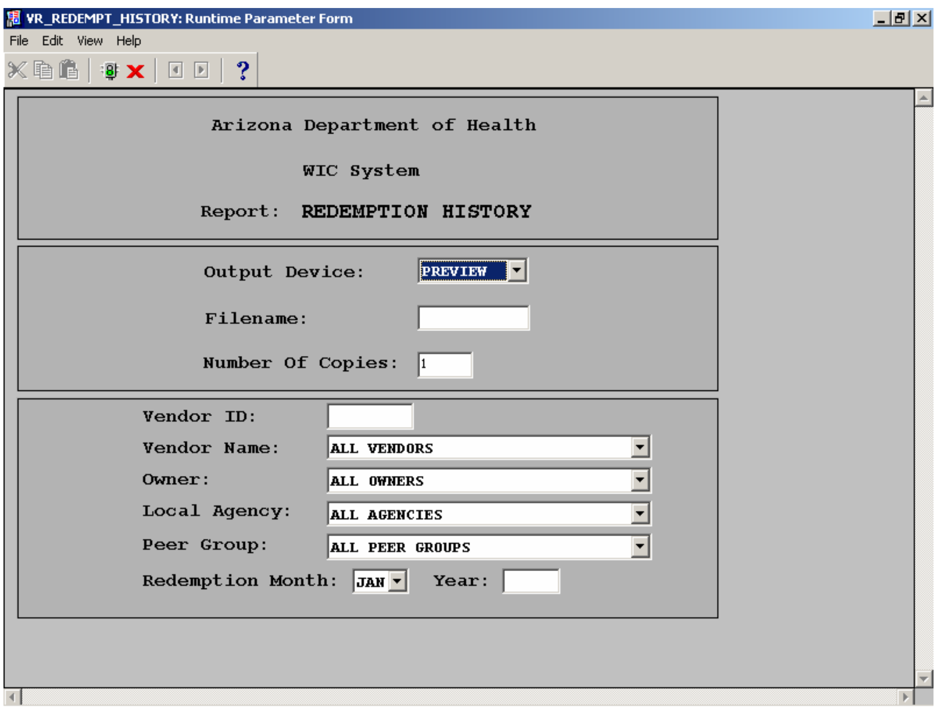
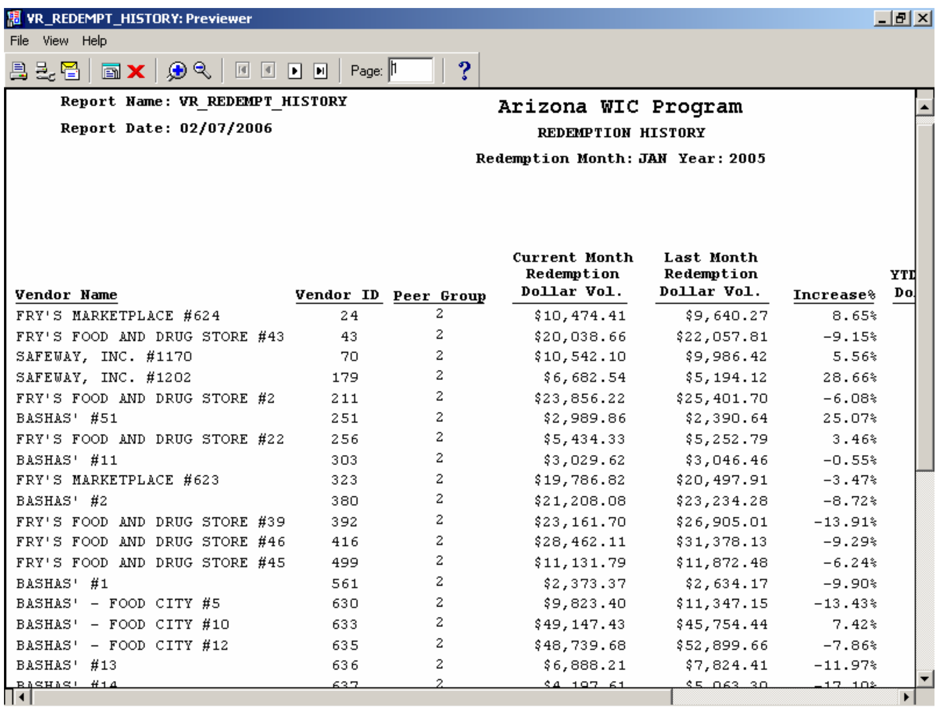


Figure 141 - Redemption History

Creating a Redemption History Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If choosing to run the report based on the default selections, select a redemption month from the list of values and enter a 4-digit year in the year field, then click the green light icon to bring up the preview screen shown below.
5. Otherwise, enter the Vendor Id and/or select the Vendor Name, and/or select an Owner, and/or a Local Agency, and/or a Peer Group from the List of Values (LOV) buttons.
6. Select the redemption month from the drop down list.
7. Type in a 4-digit year in the year field.
8. If Preview was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Report Name: VR_REDEMPT_HISTORY
Report Date: 02/07/2006

Arizona WIC Program
REDEMPTION HISTORY
Redemption Month: JAN Year: 2005

Vendor Name	Vendor ID	Peer Group	Current Month Redemption Dollar Vol.	Last Month Redemption Dollar Vol.	Increase%
FRY'S MARKETPLACE #624	24	2	$10,474.41	$9,640.27	8.65%
FRY'S FOOD AND DRUG STORE #43	43	2	$20,038.66	$22,057.81	-9.15%
SAFEWAY, INC. #1170	70	2	$10,542.10	$9,986.42	5.56%
SAFEWAY, INC. #1202	179	2	$6,682.54	$5,194.12	28.66%
FRY'S FOOD AND DRUG STORE #2	211	2	$23,856.22	$25,401.70	-6.08%
BASHAS' #51	251	2	$2,989.86	$2,390.64	25.07%
FRY'S FOOD AND DRUG STORE #22	256	2	$5,434.33	$5,252.79	3.46%
BASHAS' #11	303	2	$3,029.62	$3,046.46	-0.55%
FRY'S MARKETPLACE #623	323	2	$19,786.82	$20,497.91	-3.47%
BASHAS' #2	380	2	$21,208.08	$23,234.28	-8.72%
FRY'S FOOD AND DRUG STORE #39	392	2	$23,161.70	$26,905.01	-13.91%
FRY'S FOOD AND DRUG STORE #46	416	2	$28,462.11	$31,378.13	-9.29%
FRY'S FOOD AND DRUG STORE #45	499	2	$11,131.79	$11,872.48	-6.24%
BASHAS' #1	561	2	$2,373.37	$2,634.17	-9.90%
BASHAS' - FOOD CITY #5	630	2	$9,823.40	$11,347.15	-13.43%
BASHAS' - FOOD CITY #10	633	2	$49,147.43	$45,754.44	7.42%
BASHAS' - FOOD CITY #12	635	2	$48,739.68	$52,899.66	-7.86%
BASHAS' #13	636	2	$6,888.21	$7,824.41	-11.97%

Figure 142 - Sample of Redemption History Report

Figure 141 - Redemption History

Fields

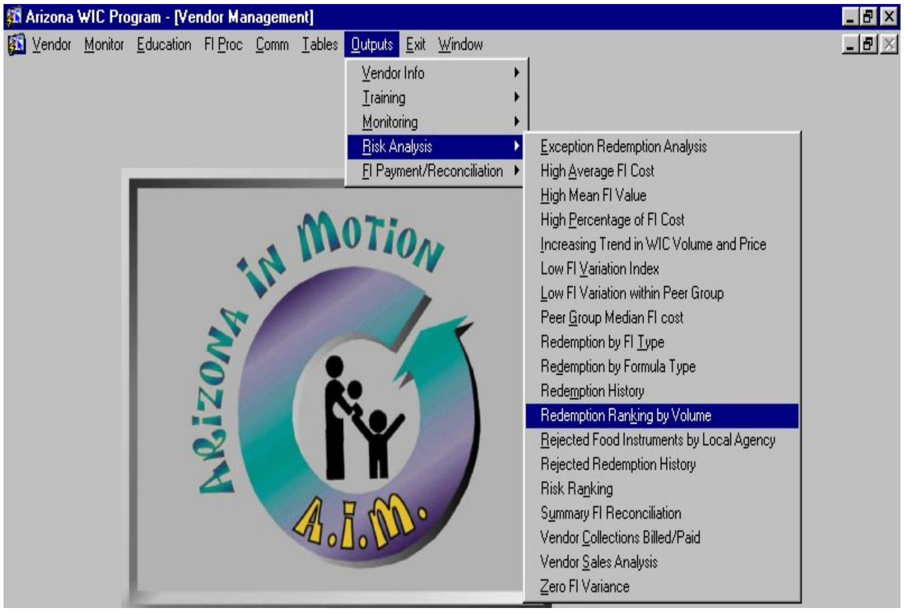
Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Vendor ID - This field is a user entered id parameter that specifies a particular vendor.
Vendor Name – The field defaults to "All Vendors", but the user may limit Vendors by selecting a

Vendor Name from a list of values.
Owner - The field defaults to “All Owners”, but the user may limit Vendors by selecting an Owner from a list of values.
Local Agency - The field defaults to “All Local Agencies”, but the user may select a Local Agency to be queried on from the list of values.
Peer Group - The user may limit Vendors by selecting a Peer Group from a list of values.
Redemption Month - The month which will be queried for food instrument reconciliations. The field defaults to the month of January.
Redemption Year - The year which will be queried for food instrument reconciliations. The field requires a four digit year format.

Producing a Redemption Ranking by Volume Report

To Produce a Redemption Ranking by Volume Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Redemption Ranking by Volume as shown below:



The Redemption Ranking by Volume parameter window is displayed:

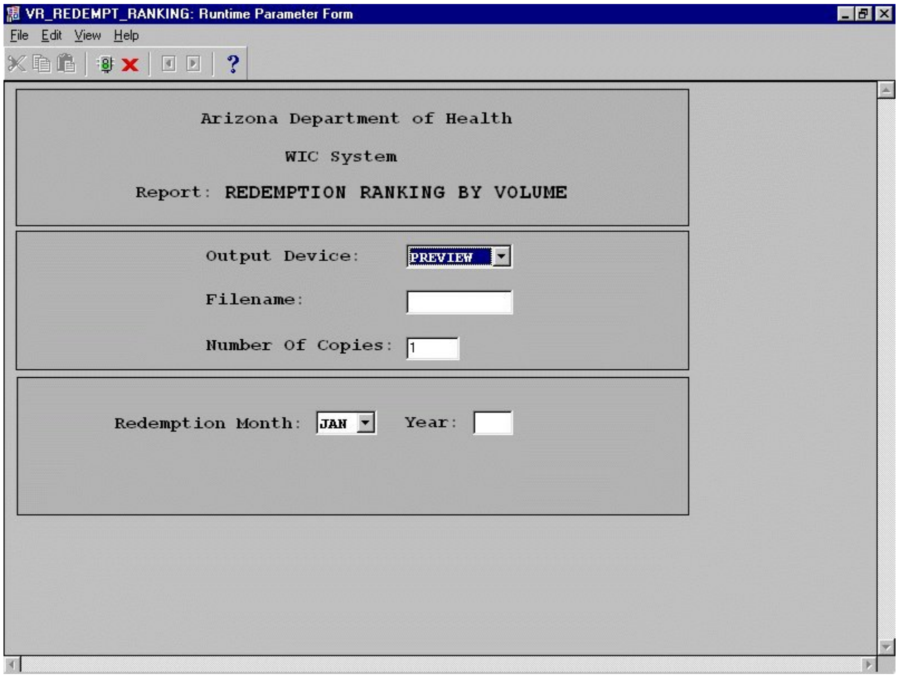


Figure 143 - Redemption Ranking by Volume

Creating a Redemption Ranking by Volume Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the redemption month from the drop down list.
5. Type in a 4 digit year in the year field.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

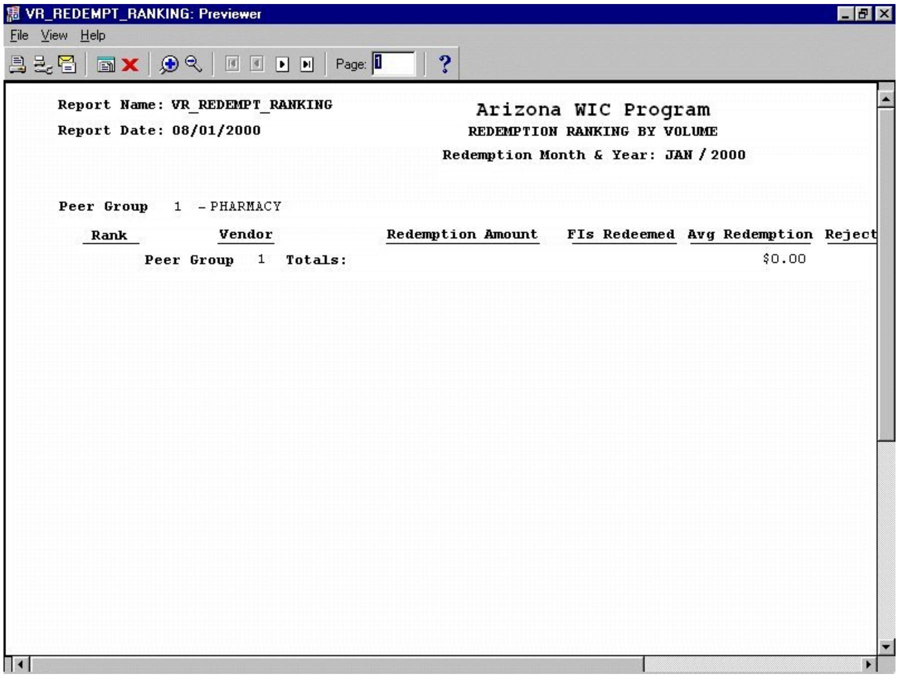


Figure 144 - Sample of Redemption Ranking by Volume Report

Figure 143 - Redemption Ranking by Volume

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption Month - The redemption month to be used in the ranking analysis.
Redemption Year - The redemption year to be used in the ranking analysis.

Producing a Rejected Food Instruments by Local Agency Report

To Produce a Rejected Food Instruments by Local Agency Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Rejected Food Instruments by Local Agency as shown below:

The Rejected Food Instruments by Local Agency parameter window is displayed:

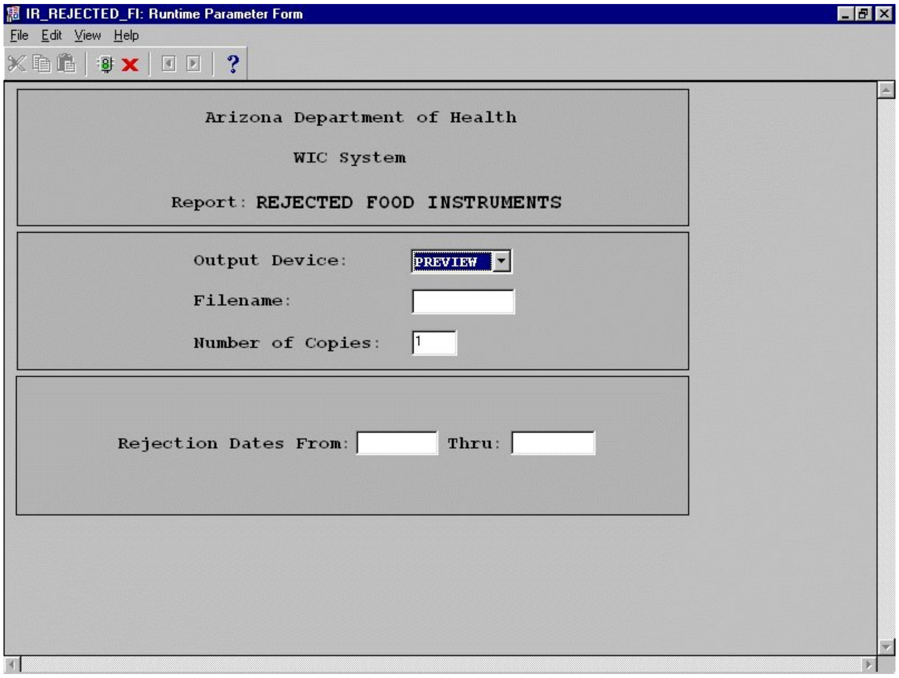


Figure 145 - Rejected Food Instruments by Local Agency

Creating a Rejected Food Instruments by Local Agency Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in the rejection dates from and thru fields with a date in the standard (MM/DD/YYYY) format.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

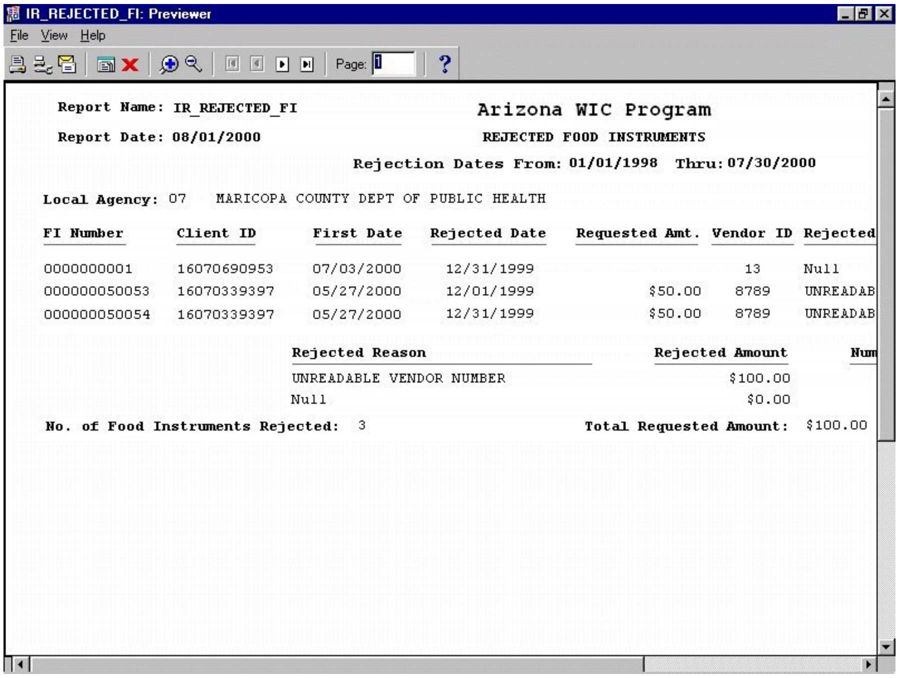


Figure 146 - Sample of Rejected Food Instruments by Local Agency Report

Figure 145 - Rejected Food Instruments by Local Agency

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - Allows the user to select a summary or a detail of summary report.
Rejection Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Rejected Redemption History Report

To Produce a Rejected Redemption History Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Rejected Redemption History as shown below:

The Rejected Redemption History parameter window is displayed:

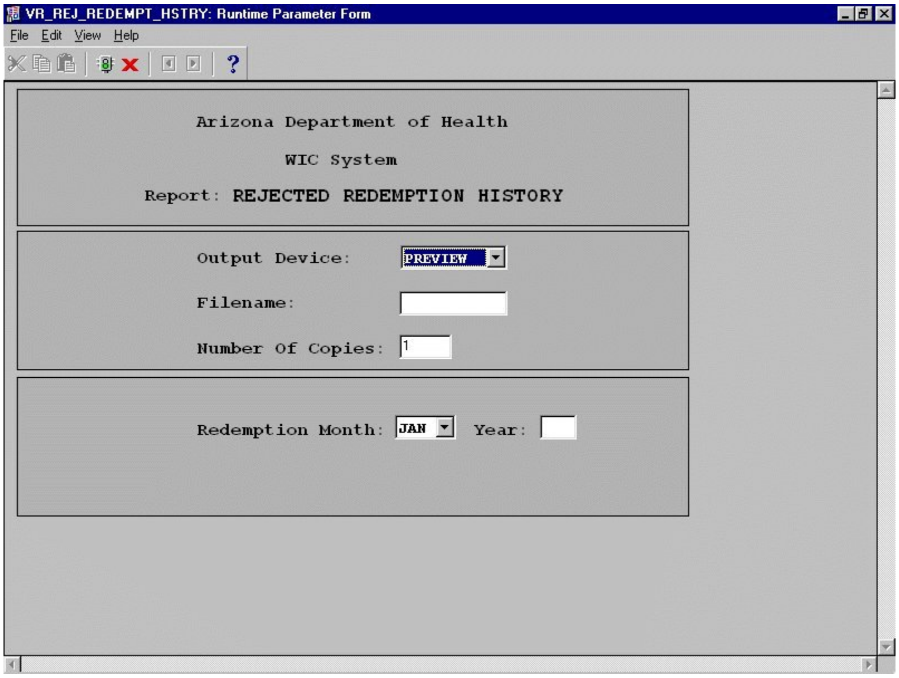


Figure 147 - Rejected Redemption History

Creating a Rejected Redemption History Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the redemption month from the drop down list.
5. Type in a 4 digit year in the year field.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

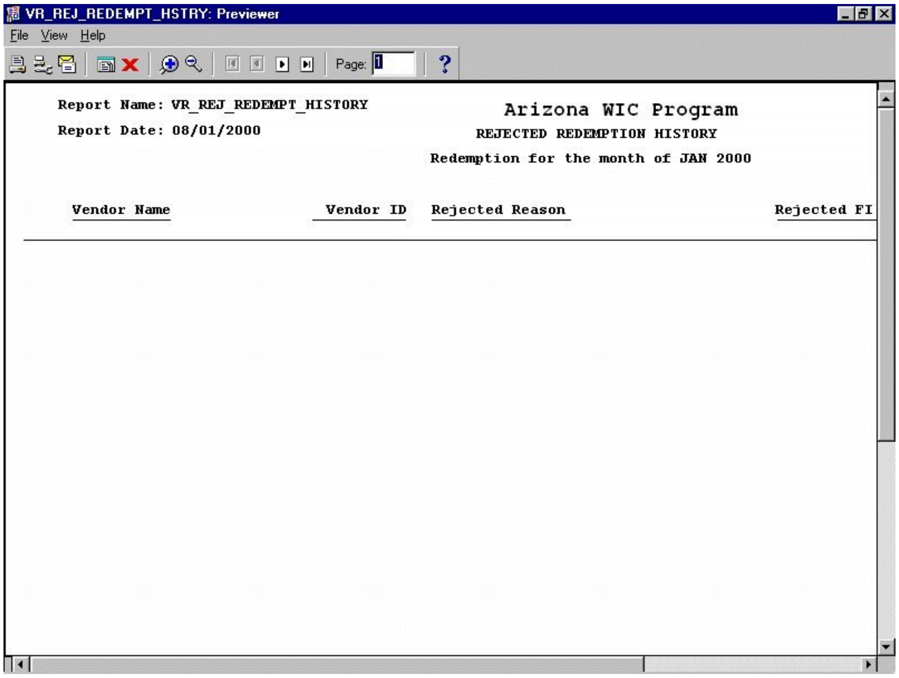


Figure 148 - Sample of Rejected Redemption History Report

Figure 147 - Rejected Redemption History

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption Month - The month which will be queried for food instrument reconciliation.
Year - The year which will be queried for food instrument reconciliation.

Producing a Risk Ranking Report

To Produce a Risk Ranking Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Risk Ranking as shown below:

The Risk Ranking parameter window is displayed:

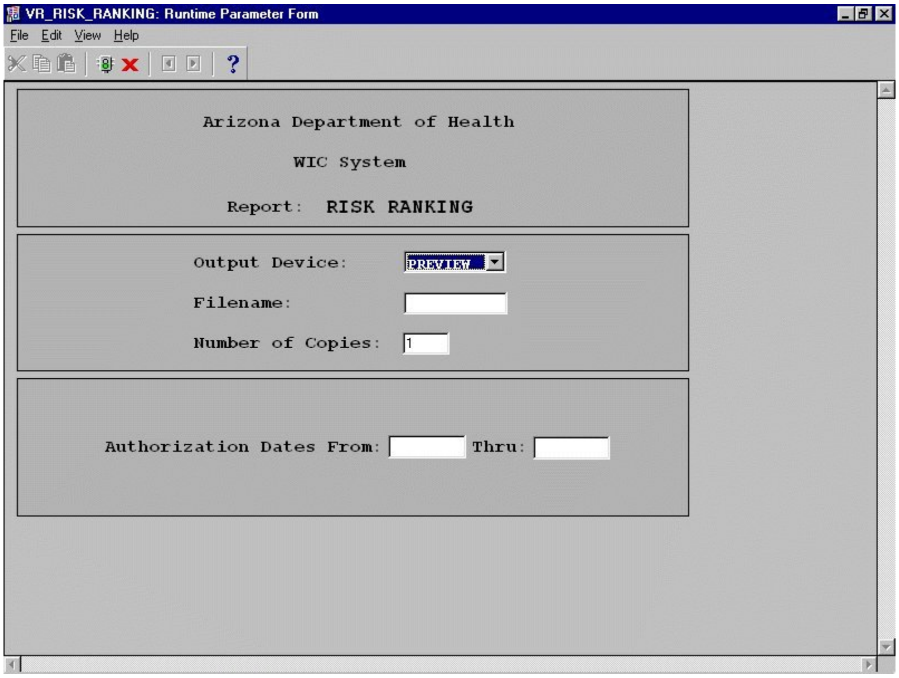


Figure 149 - Risk Ranking

Creating a Risk Ranking Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in the redemption dates from and thru fields with a date in the standard (MM/DD/YYYY) format.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

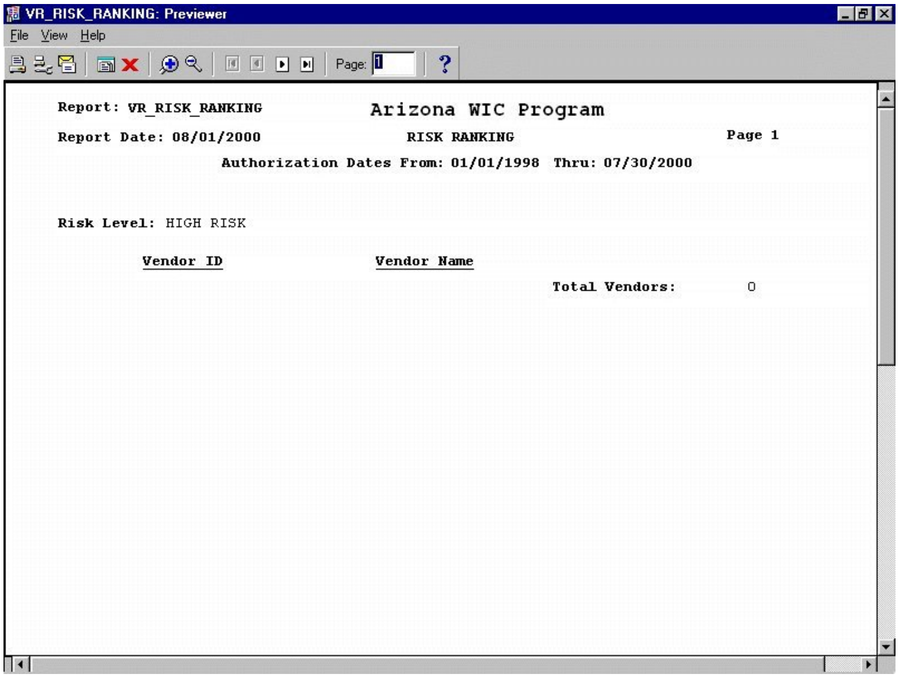


Figure 150 - Sample of Risk Ranking Report

Figure 149 - Risk Ranking

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Authorization Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Summary FI Reconciliation Report

To Produce a Summary FI Reconciliation Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Summary FI Reconciliation as shown below:

The Summary FI Reconciliation parameter window is displayed:

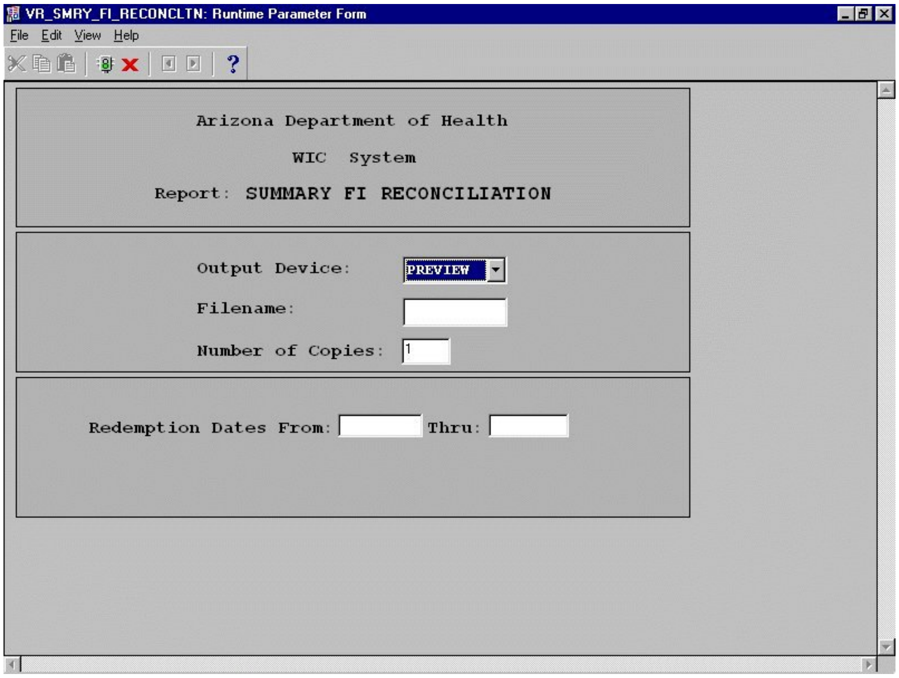
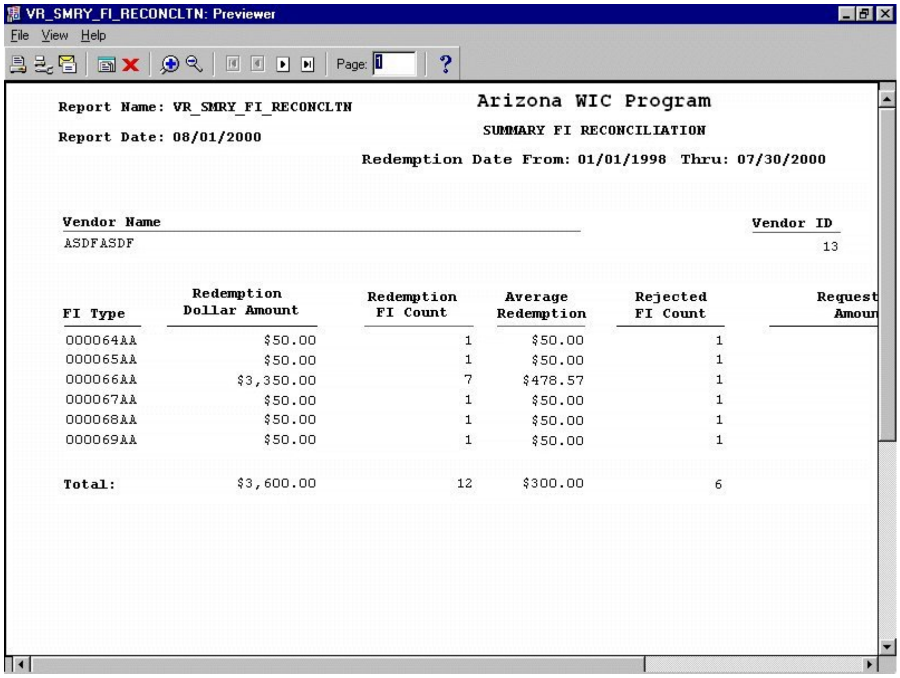


Figure 151 - Summary FI Reconciliation

Creating a Summary FI Reconciliation Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in the redemption dates from and thru fields with a date in the standard (MM/DD/YYYY) format.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.


VR_SMRY_FI_RECONCLTN: Previewer

File View Help

Page: 1

Report Name: VR_SMRY_FI_RECONCLTN

Report Date: 08/01/2000

Arizona WIC Program

SUMMARY FI RECONCILIATION

Redemption Date From: 01/01/1998 Thru: 07/30/2000

Vendor Name: ASDFASDF

Vendor ID: 13

FI Type	Redemption Dollar Amount	Redemption FI Count	Average Redemption	Rejected FI Count	Request Amoun
000064AA	$50.00	1	$50.00	1	
000065AA	$50.00	1	$50.00	1	
000066AA	$3,350.00	7	$478.57	1	
000067AA	$50.00	1	$50.00	1	
000068AA	$50.00	1	$50.00	1	
000069AA	$50.00	1	$50.00	1	
Total:	$3,600.00	12	$300.00	6	

Figure 152 - Sample of Summary FI Reconciliation Report

Figure 151 - Summary FI Reconciliation

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Vendor Collections Billed/Paid Report

To Produce a Vendor Collections Billed/Paid Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis
3. Click on Vendor Collections Billed/Paid as shown below:

The Vendor Collections Billed/Paid parameter window is displayed:

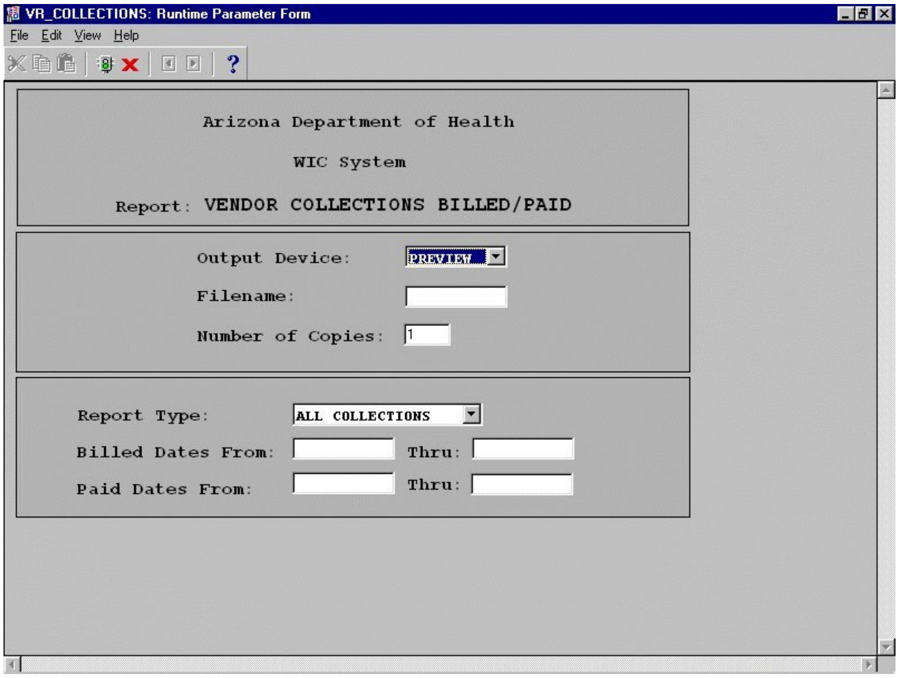


Figure 153 - Vendor Collections Billed/Paid

Creating a Vendor Collections Billed/Paid Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
10. Select the report type using the drop down list.
11. Fill in the billed date from and thru fields with dates in the standard (MM/DD/YYYY) format.
12. Fill in the paid date from and thru fields with dates in the standard (MM/DD/YYYY) format.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

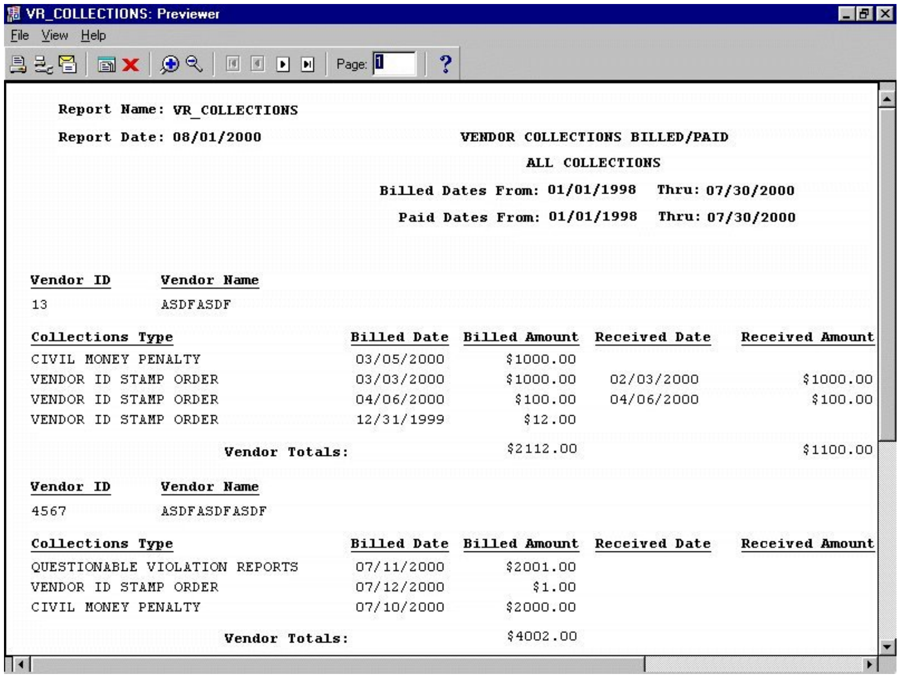


Figure 154 - Sample of Vendor Collections Billed/Paid Report

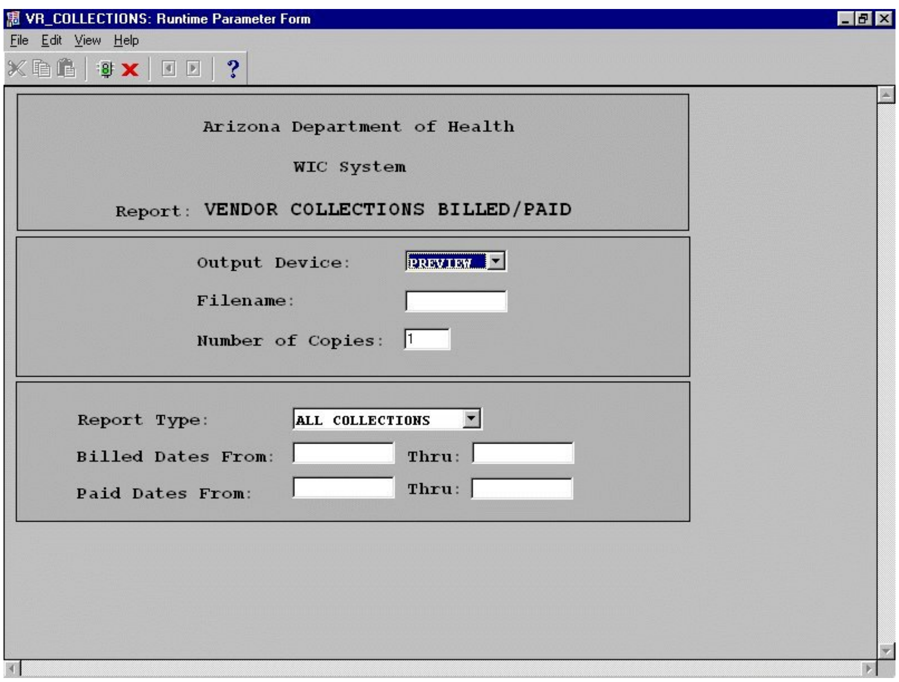


Figure 153 - Vendor Collections Billed/Paid

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Report Type - The user may select all collections or a subset: all collections, all paid, or all unpaid.
Billed Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.
Paid Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Vendor Sales Analysis Report

To Produce a Vendor Sales Analysis Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Vendor Sales Analysis as shown below:

The Vendor Sales Analysis parameter window is displayed:

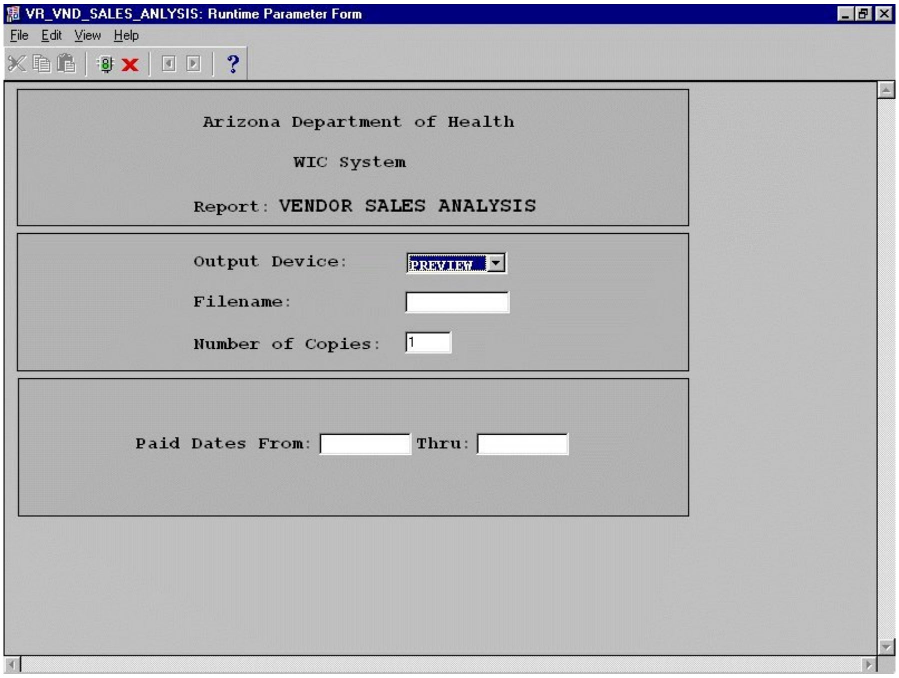


Figure 155 - Vendor Sales Analysis

Creating a Vendor Sales Analysis Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in the Paid dates from and thru fields with a date in the standard (MM/DD/YYYY) format.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

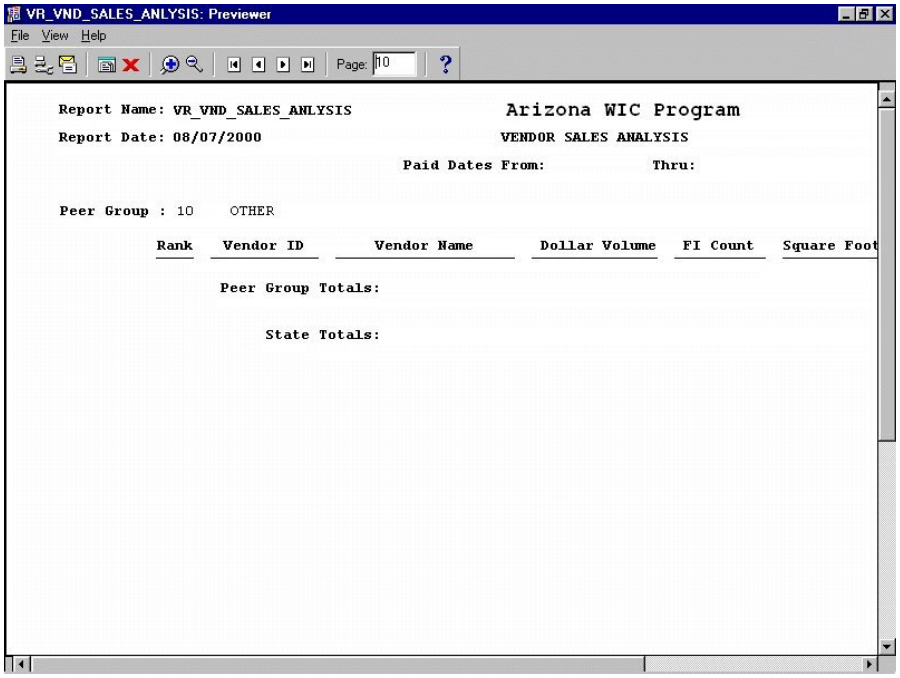


Figure 156 - Sample of Vendor Sales Analysis Report

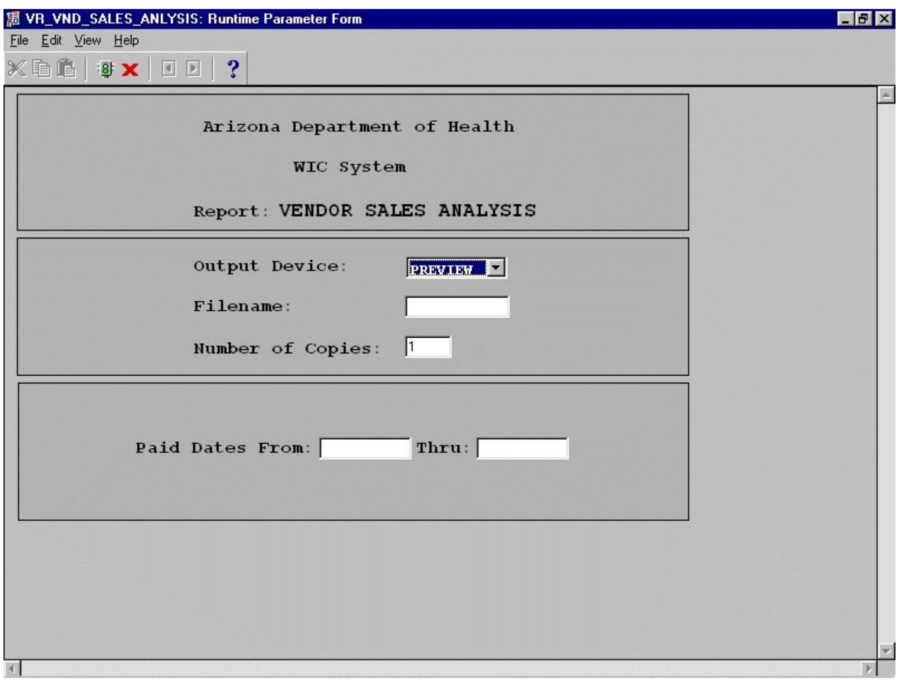


Figure 155 - Vendor Sales Analysis

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Paid Dates From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a Zero FI Variance Report

To Produce a Zero FI Variance Report:

1. Click on Outputs from the menu bar.
2. Click on Risk Analysis.
3. Click on Zero FI Variance as shown below:

The Zero FI Variance parameter window is displayed:

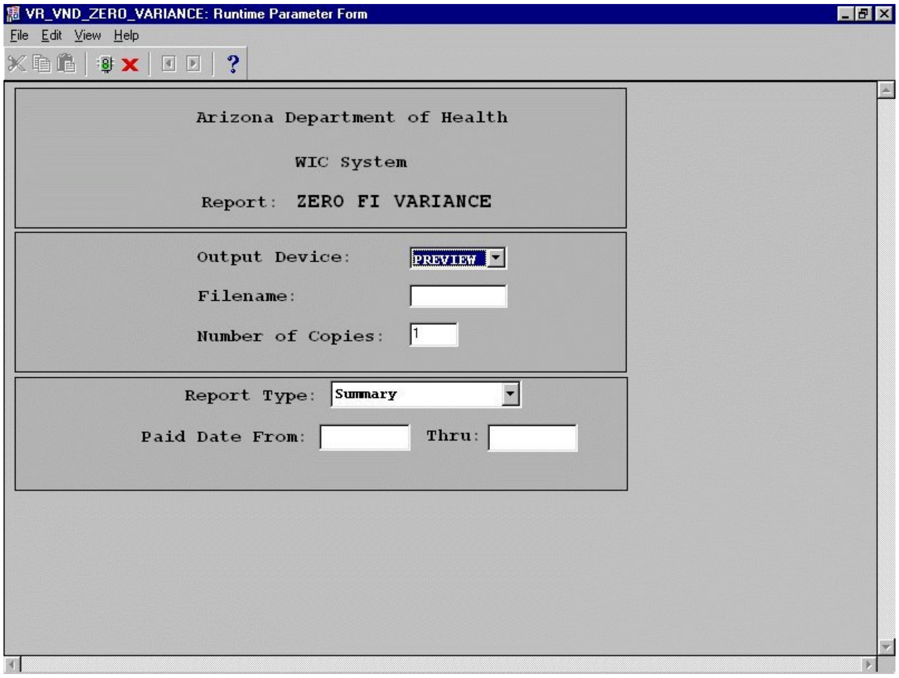


Figure 157 - Zero FI Variance

Creating a Zero FI Variance Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type using the drop down list.
5. Fill in the paid date from and thru fields with dates in the standard (MM/DD/YYYY) format.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

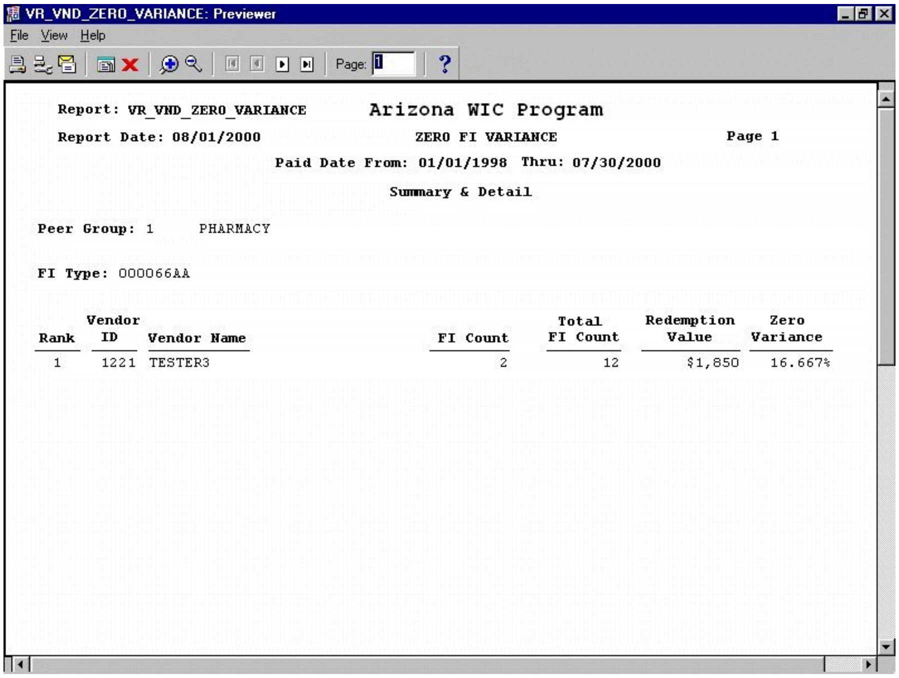


Figure 158 - Sample of Zero FI Variance Report

Figure 157 - Zero FI Variance

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may chose the type of report generated - summary, detail, or summary and detail.
Paid Date From - The beginning date of the data queried.
Thru - The ending date of the data queried.

Producing a FI Type File Listing Report

To Produce a FI Type File Listing Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on FI Type File Listing as shown below:

The FI Type File Listing parameter window is displayed:

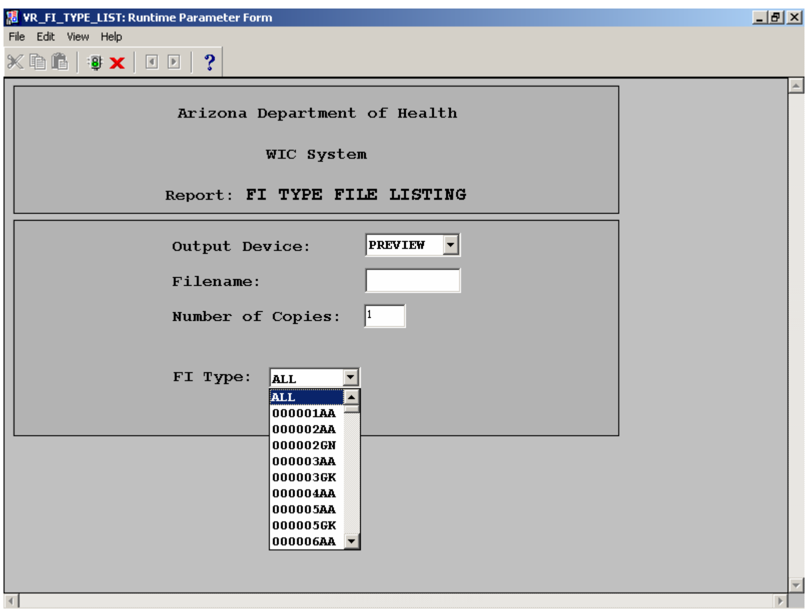
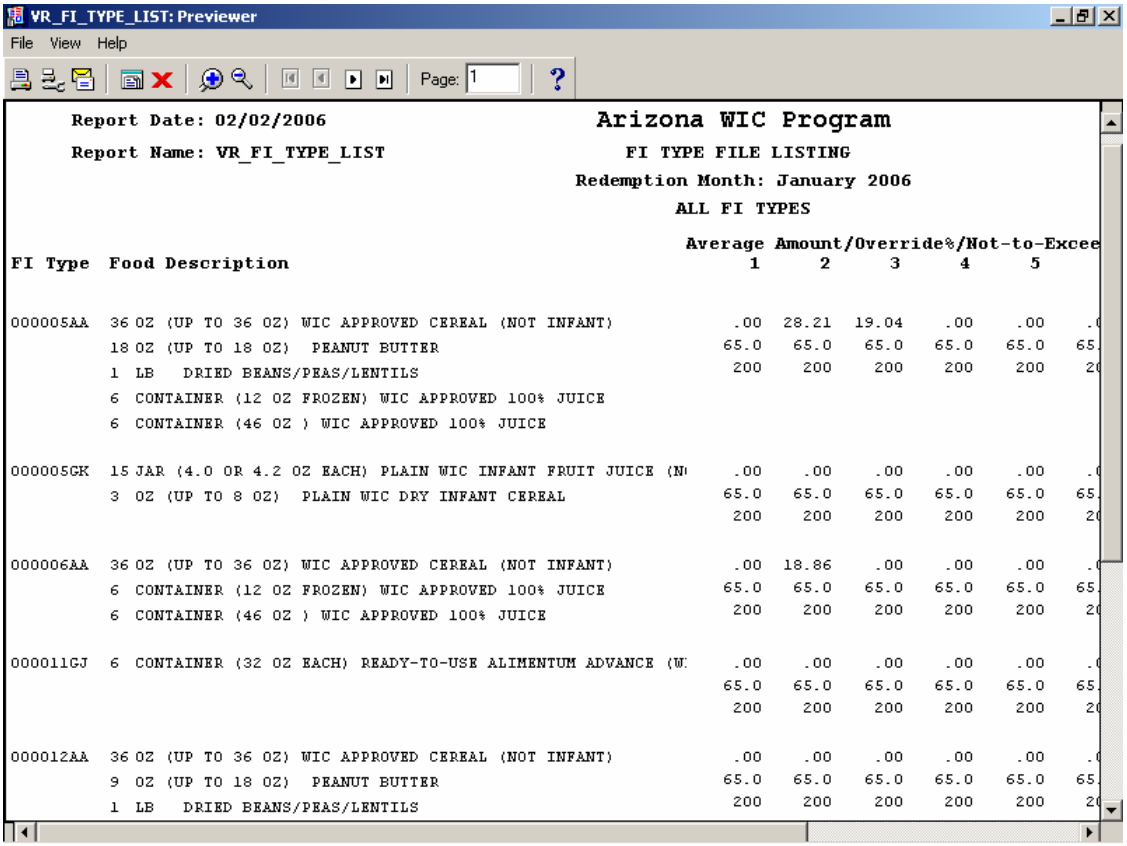


Figure 159 - FI Type File Listing

Creating a FI Type File Listing Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select a single FI Type from the List of Values (LOV) arrow button, or default to the All selection to view all FI Types on the report.
5. Click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



Report Date: 02/02/2006
Report Name: VR_FI_TYPE_LIST

Arizona WIC Program
FI TYPE FILE LISTING
Redemption Month: January 2006
ALL FI TYPES

FI Type	Food Description	1	2	3	4	5
		Average Amount/Override%/Not-to-Excee				
000005AA	36 OZ (UP TO 36 OZ) WIC APPROVED CEREAL (NOT INFANT)	.00	28.21	19.04	.00	.00
	18 OZ (UP TO 18 OZ) PEANUT BUTTER	65.0	65.0	65.0	65.0	65.0
	1 LB DRIED BEANS/PEAS/LENTILS	200	200	200	200	200
	6 CONTAINER (12 OZ FROZEN) WIC APPROVED 100% JUICE					
	6 CONTAINER (46 OZ) WIC APPROVED 100% JUICE					
000005GK	15 JAR (4.0 OR 4.2 OZ EACH) PLAIN WIC INFANT FRUIT JUICE (N	.00	.00	.00	.00	.00
	3 OZ (UP TO 8 OZ) PLAIN WIC DRY INFANT CEREAL	65.0	65.0	65.0	65.0	65.0
		200	200	200	200	200
000006AA	36 OZ (UP TO 36 OZ) WIC APPROVED CEREAL (NOT INFANT)	.00	18.86	.00	.00	.00
	6 CONTAINER (12 OZ FROZEN) WIC APPROVED 100% JUICE	65.0	65.0	65.0	65.0	65.0
	6 CONTAINER (46 OZ) WIC APPROVED 100% JUICE	200	200	200	200	200
000011GJ	6 CONTAINER (32 OZ EACH) READY-TO-USE ALIMENTUM ADVANCE (W	.00	.00	.00	.00	.00
		65.0	65.0	65.0	65.0	65.0
		200	200	200	200	200
000012AA	36 OZ (UP TO 36 OZ) WIC APPROVED CEREAL (NOT INFANT)	.00	.00	.00	.00	.00
	9 OZ (UP TO 18 OZ) PEANUT BUTTER	65.0	65.0	65.0	65.0	65.0
	1 LB DRIED BEANS/PEAS/LENTILS	200	200	200	200	200

Figure 160 - Sample of FI Type File Listing Report

Figure 159 - FI Type File Listing

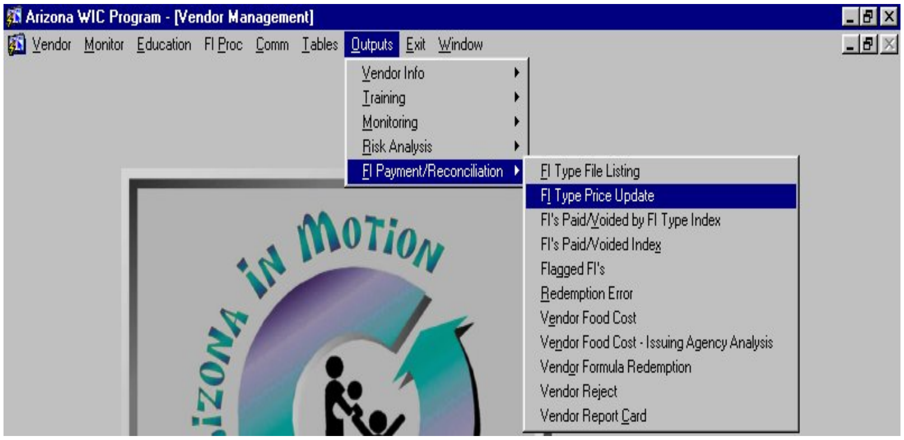
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a FI Type Price Update Report

To Produce a FI Type Price Update Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on FI Type Price Update as shown below:



The FI Type Price Update parameter window is displayed:

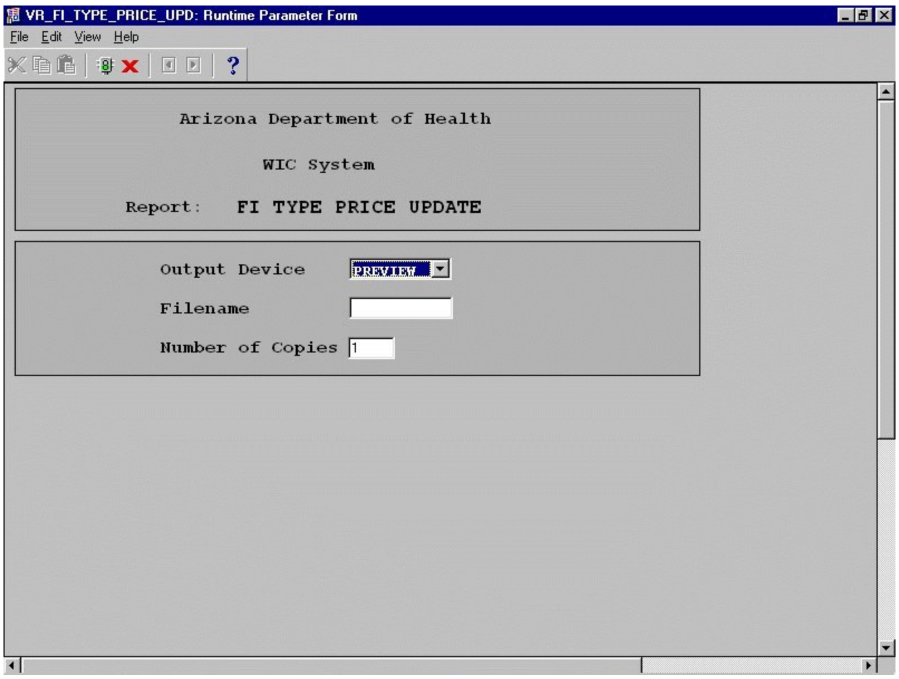


Figure 161 - FI Type Price Update

Creating a FI Type Price Update Report

Complete the FI Type Price Update dialog box as described below.

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

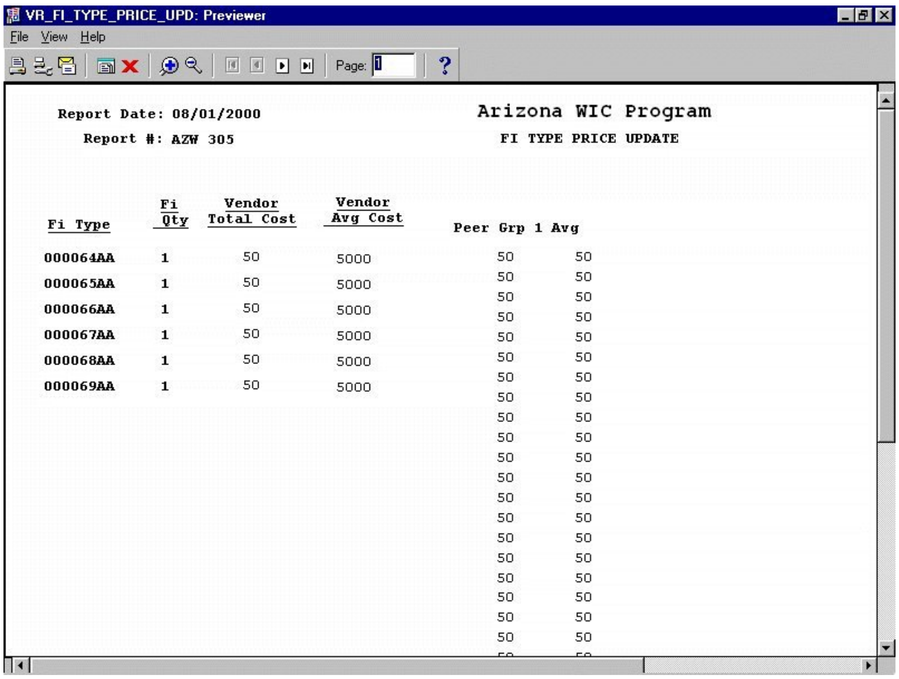


Figure 162 - Sample of FI Type Price Update Report

Figure 161 - FI Type Price Update

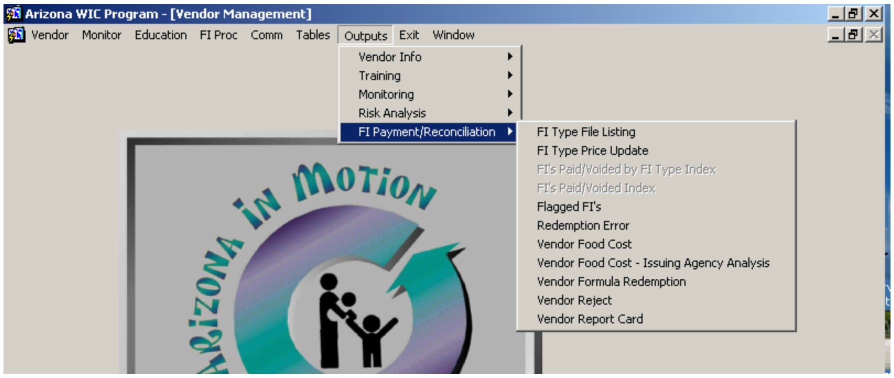
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.

Producing a FIs Paid/Voided by FI Type Index Report (No longer in use by AZ 6/8/06 – no access to report via AIM.)

To Produce a FIs Paid/Voided by FI Type Index Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on FI's Paid/Voided by FI Type Index as shown below:



The FI's Paid/Voided by FI Type Index parameter window is displayed:

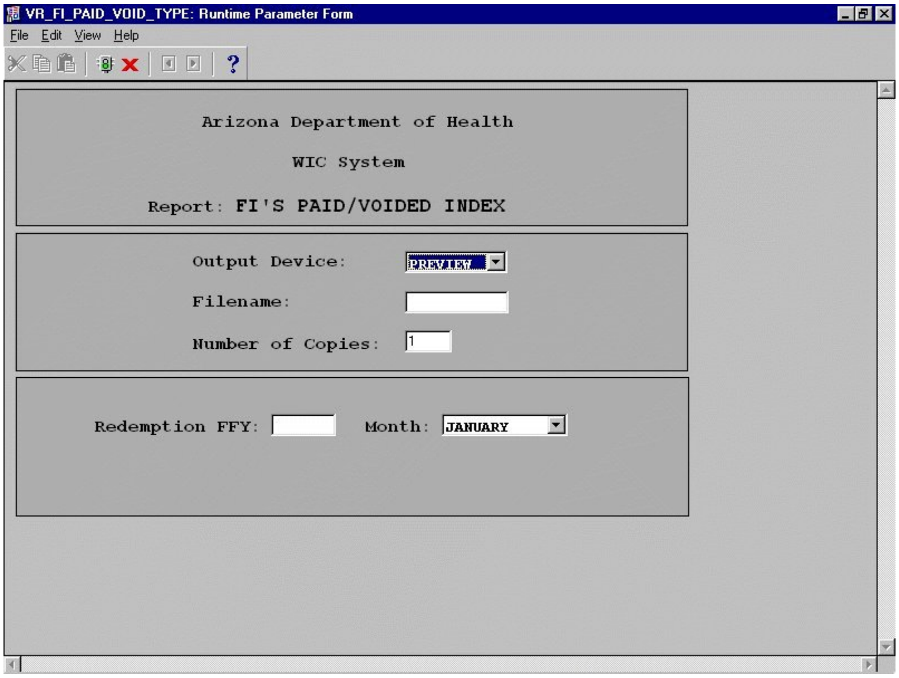


Figure 163 - FI's Paid/Voided by FI Type Index

Creating a FI's Paid/Voided by FI Type Index Report

Complete the FI's Paid/Voided by FI Type Index dialog box as described below.

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in a 4 digit year in the FFY year field.
5. Select the month from the drop down list.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

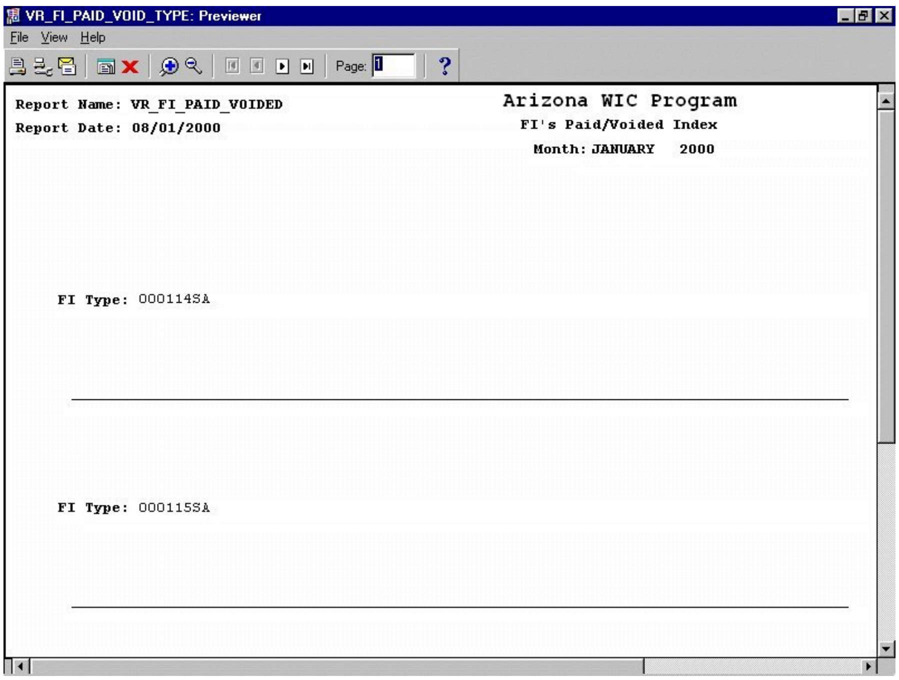


Figure 164 - Sample of FI's Paid/Voided by FI Type Index Report

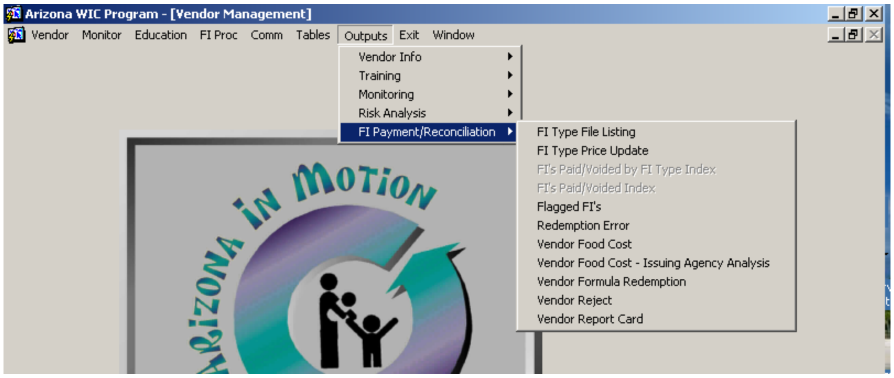
Figure 163 - FI's Paid/Voided by FI Type Index

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Month - The fiscal month which will be queried for food instrument reconciliation.

Producing a FI's Paid/Voided Index Report (No longer in use by AZ 6/8/06 – no access to report via AIM.)

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on FI's Paid/Voided Index as shown below:



The FI's Paid/Voided Index parameter window is displayed:

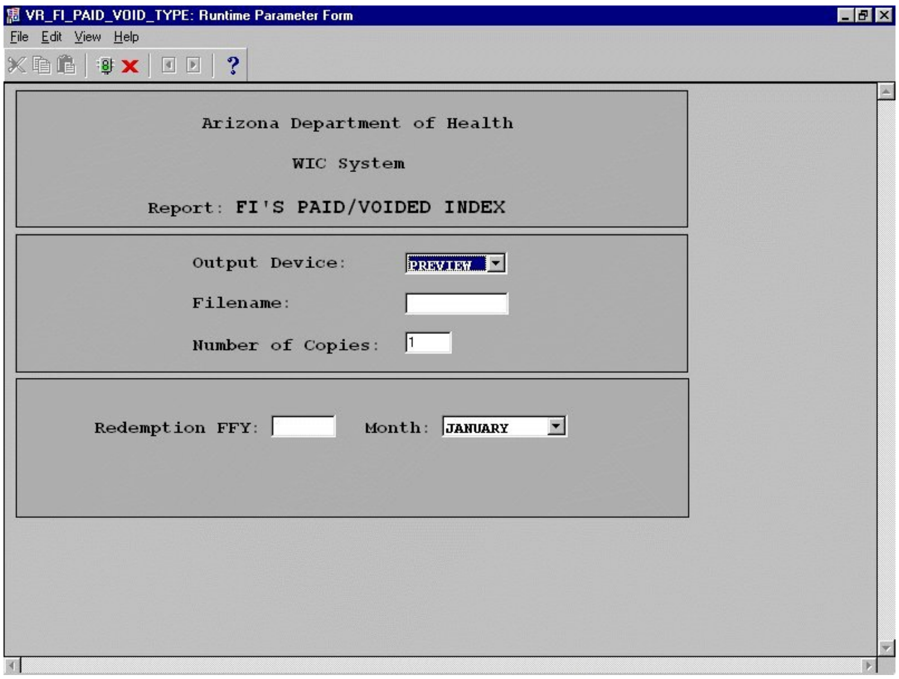


Figure 165 - FI's Paid/Voided Index

Creating a FI's Paid/Voided Index Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in a 4 digit year in the FFY year field.
5. Select the month from the drop down list.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

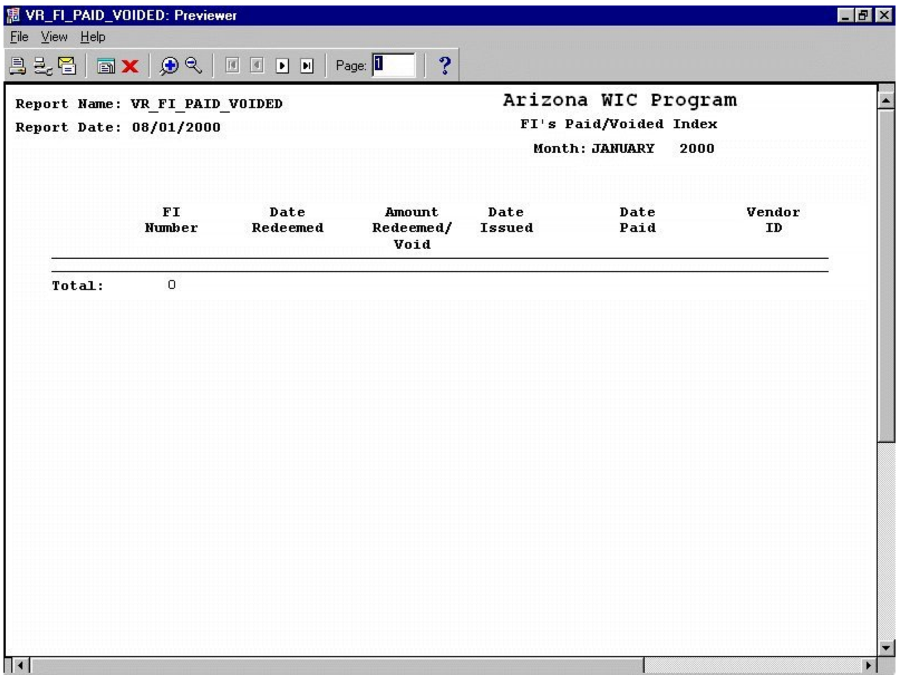


Figure 166 - Sample of FI's Paid/Voided Index Report

Figure 165 - FI's Paid/Voided Index

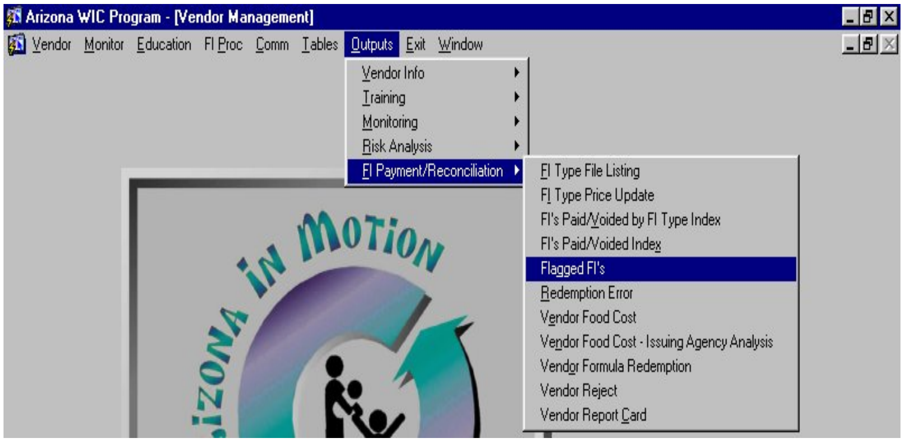
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Month - The fiscal month which will be queried for food instrument reconciliation.

Producing a Flagged FI's Report

To Produce a Flagged FI's Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on Flagged FI's as shown below:



The Flagged FI's parameter window is displayed:

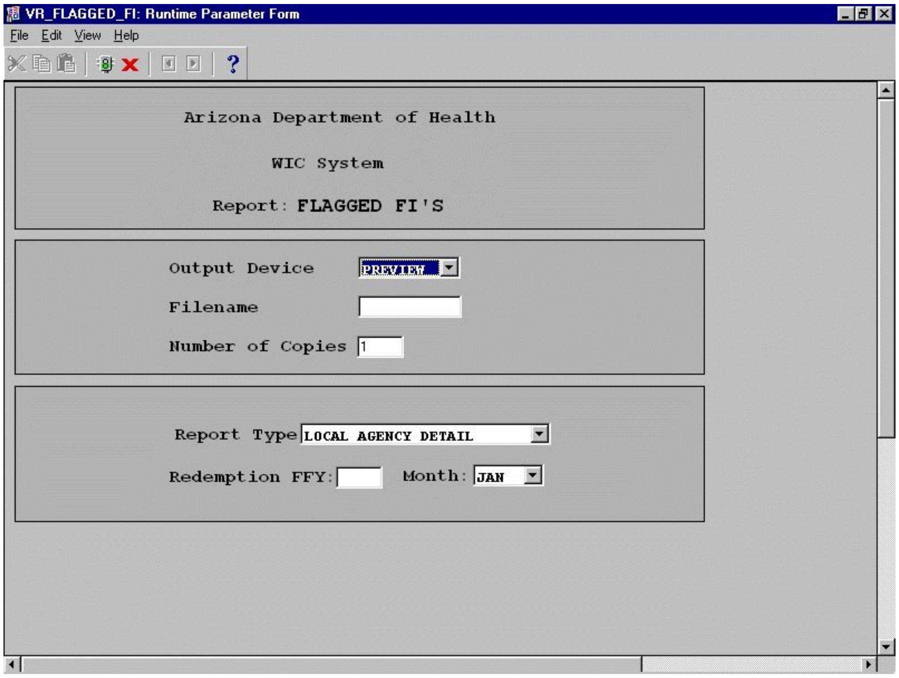


Figure 167 - Flagged FI's

Creating a Flagged FI's Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type using the drop down list.
5. Type in a 4 digit year in the FFY year field.
6. Select the month from the drop down list.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

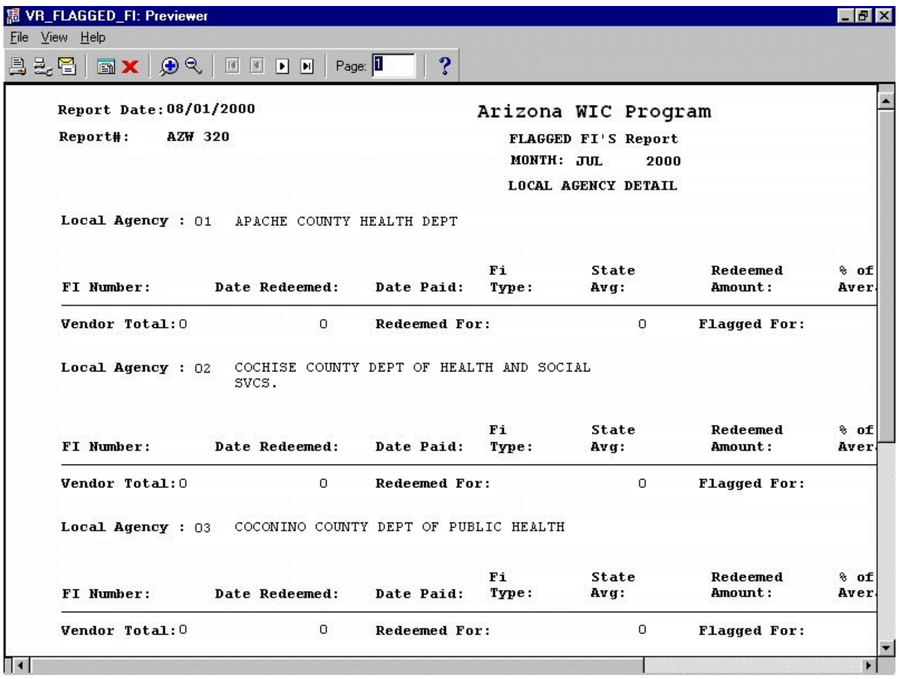


Figure 168 - Sample of Flagged FI's Report

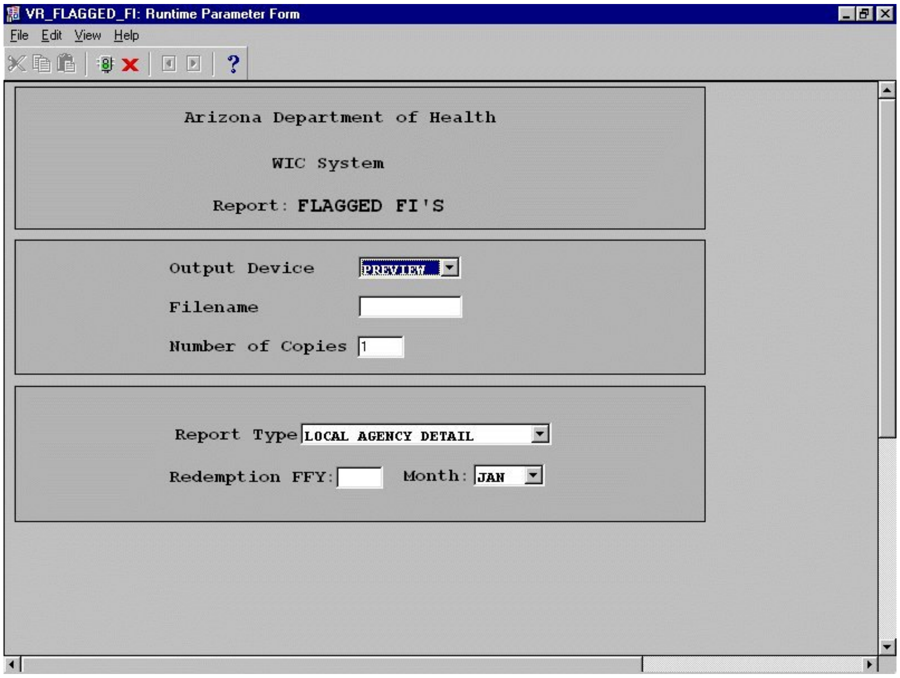


Figure 167 - Flagged FI's

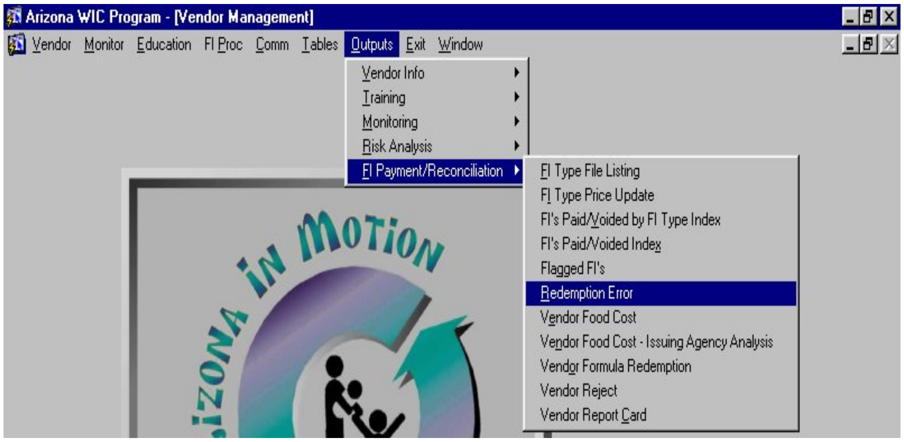
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - Allows the user to select the Local Agency Detail, State Summary, or both.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Month - The fiscal month which will be queried for food instrument reconciliation.

Producing a Redemption Error Report

To Produce a Redemption Error Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on Redemption Error as shown below:



The Redemption Error parameter window is displayed:

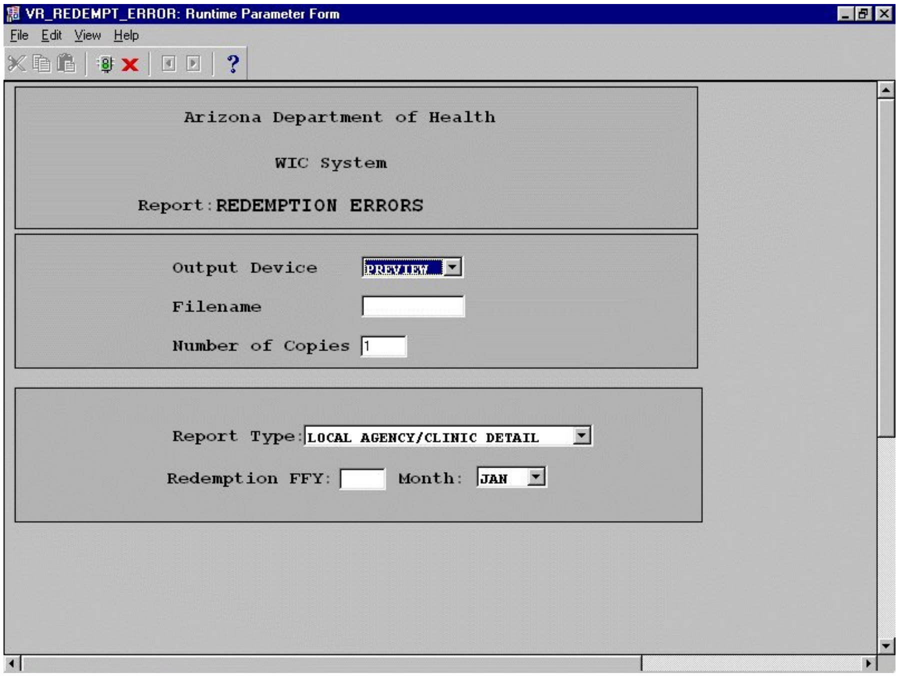


Figure 169 - Redemption Error

Creating a Redemption Error Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type using the drop down list.
5. Type in a 4 digit year in the FFY year field.
6. Select the month from the drop down list.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

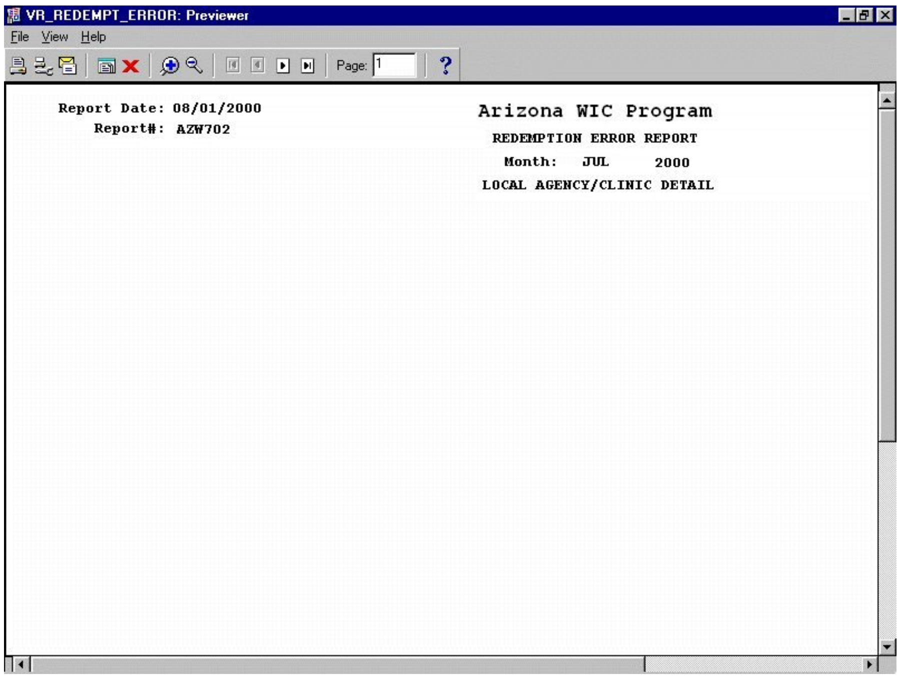


Figure 170 - Sample of Redemption Error Report

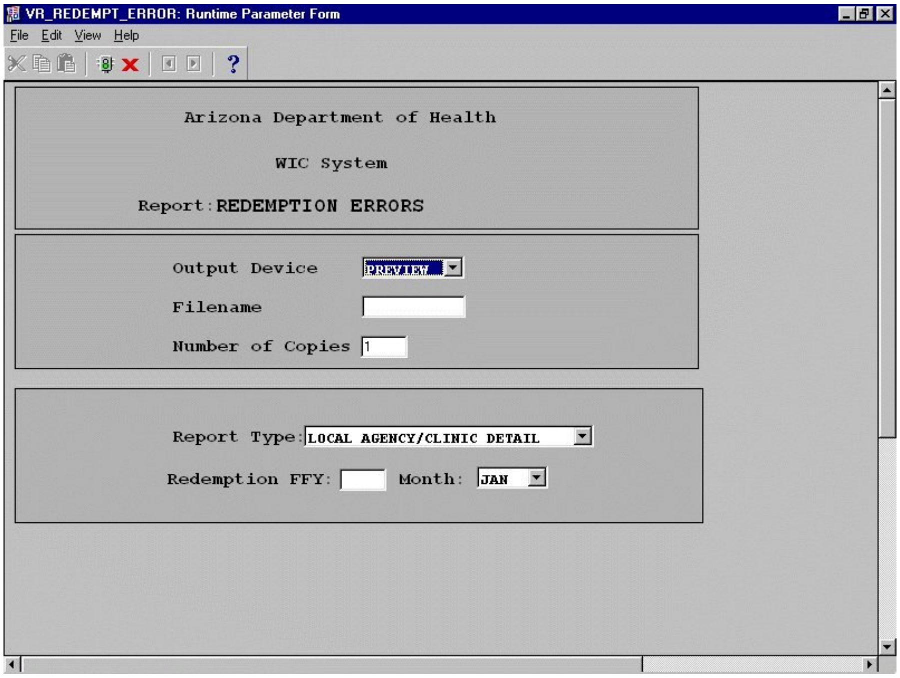


Figure 169 - Redemption Error

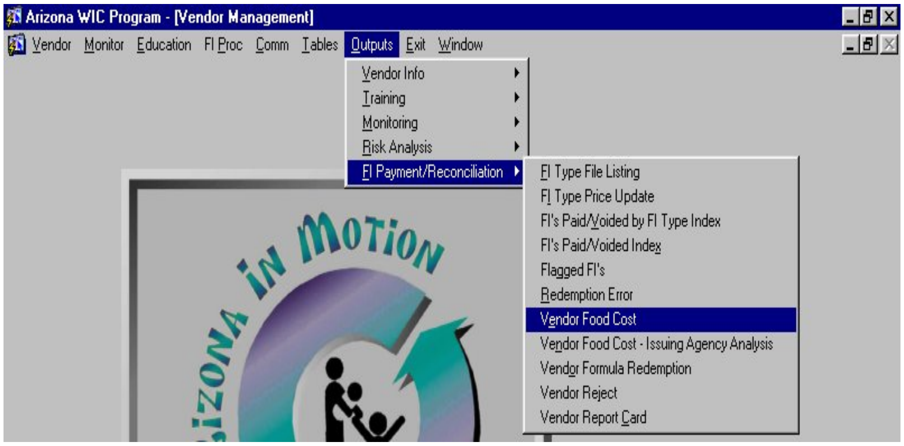
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - Allows the user to select the Participant Details, State Totals, or both.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Month - The fiscal month which will be queried for food instrument reconciliation.

Producing a Vendor Food Cost Report

To Produce a Vendor Food Cost Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on Vendor Food Cost as shown below:



The Vendor Food Cost parameter window is displayed:

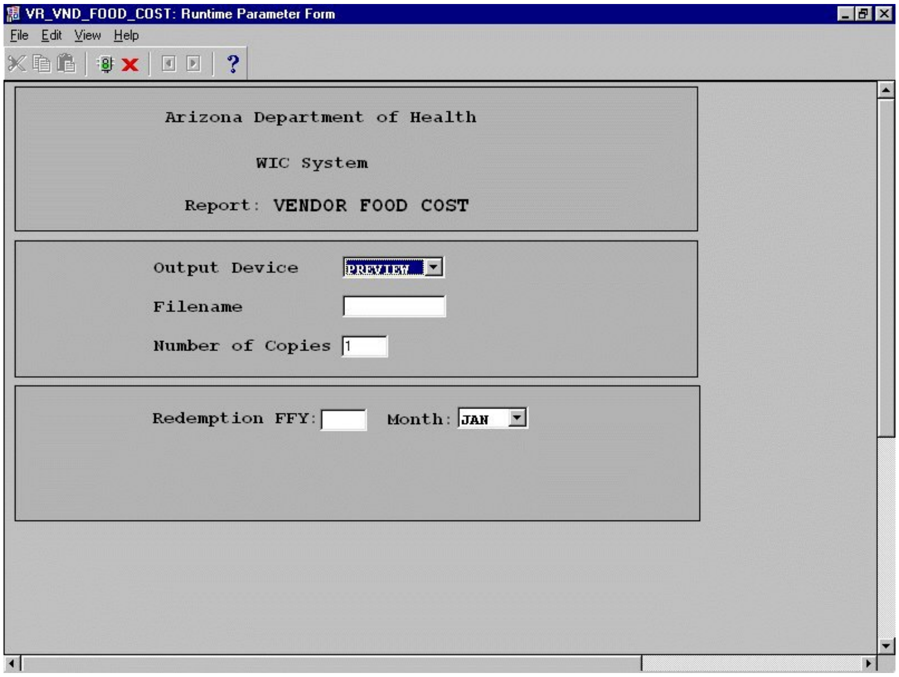


Figure 171 - Vendor Food Cost

Creating a Vendor Food Cost Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Type in a 4digit year in the FFY year field.
5. Select the month from the drop down list.
6. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

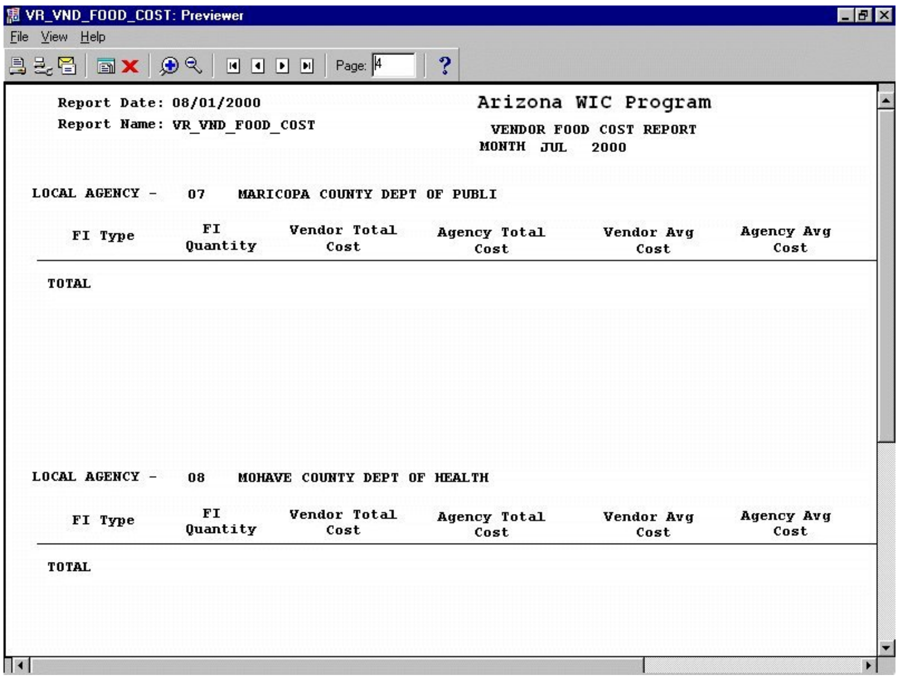


Figure 172 - Sample of Vendor Food Cost Report

Figure 171 - Vendor Food Cost

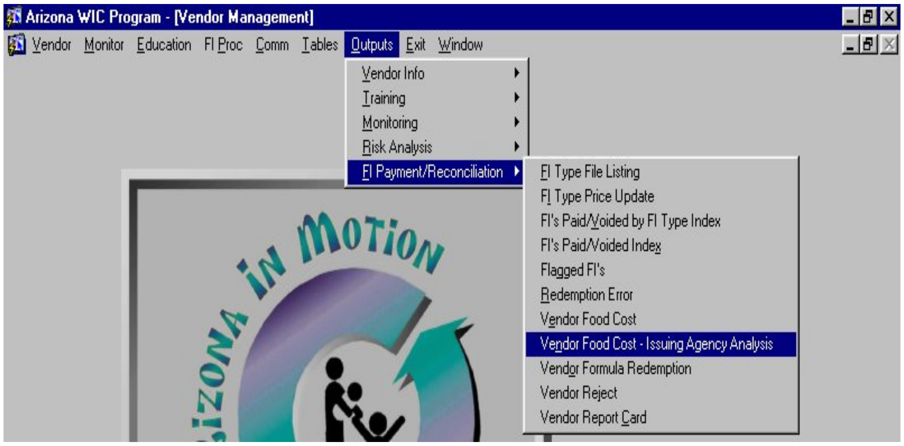
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Month - The fiscal month which will be queried for food instrument reconciliation.

Producing a Vendor Food Cost – Issuing Agency Analysis Report

To Produce a Vendor Food Cost – Issuing Agency Analysis Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on Vendor Food Cost – Issuing Agency Analysis as shown below:



The Vendor Food Cost – Issuing Agency Analysis parameter window is displayed:

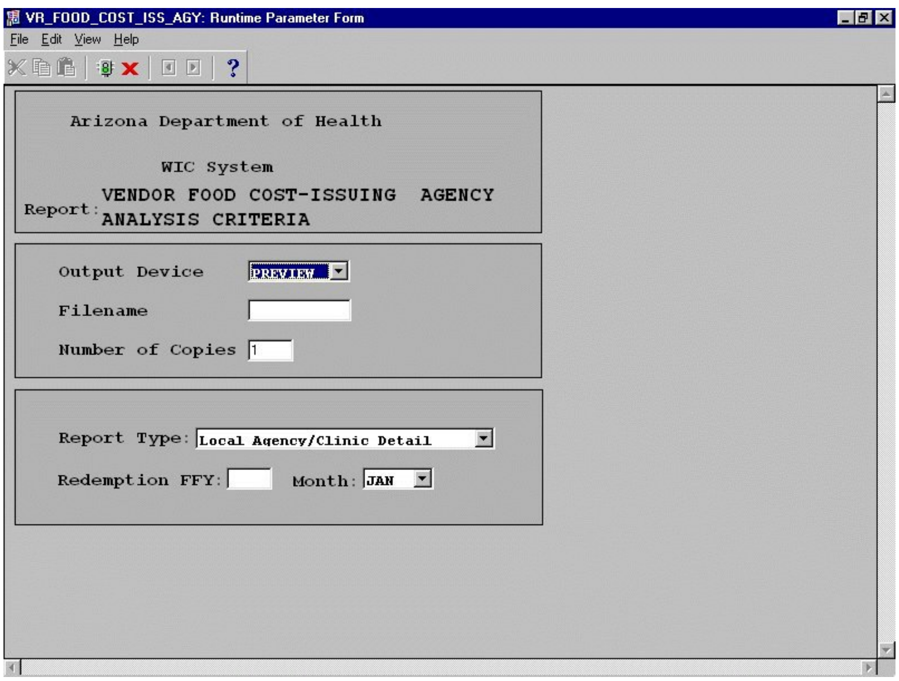
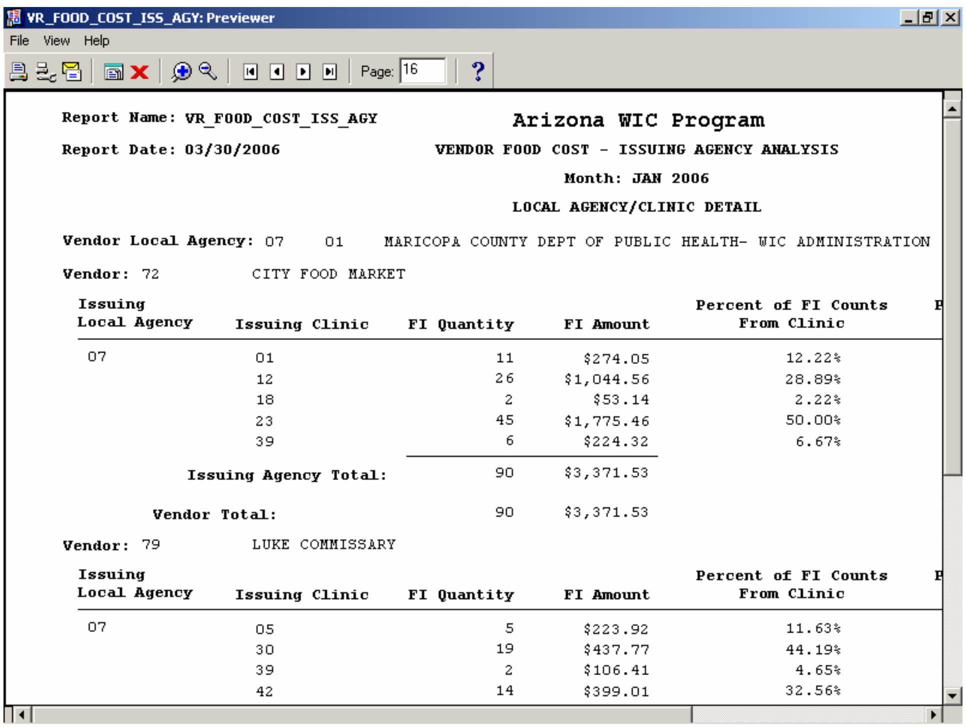


Figure 173 - Vendor Food Cost – Issuing Agency Analysis

Creating a Vendor Food Cost – Issuing Agency Analysis Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the report type using the drop down list.
5. Type in a 4 digit year in the FFY year field.
6. Select the month from the drop down list.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.



VR_FOOD_COST_ISS_AGY: Previewer

File View Help

Page: 16

Report Name: VR_FOOD_COST_ISS_AGY

Report Date: 03/30/2006

Arizona WIC Program

VENDOR FOOD COST - ISSUING AGENCY ANALYSIS

Month: JAN 2006

LOCAL AGENCY/CLINIC DETAIL

Vendor Local Agency: 07 01 MARICOPA COUNTY DEPT OF PUBLIC HEALTH- WIC ADMINISTRATION

Vendor: 72 CITY FOOD MARKET

Issuing Local Agency	Issuing Clinic	FI Quantity	FI Amount	Percent of FI Counts From Clinic
07	01	11	$274.05	12.22%
	12	26	$1,044.56	28.89%
	18	2	$53.14	2.22%
	23	45	$1,775.46	50.00%
	39	6	$224.32	6.67%
Issuing Agency Total:		90	$3,371.53	
Vendor Total:		90	$3,371.53	

Vendor: 79 LUKE COMMISSARY

Issuing Local Agency	Issuing Clinic	FI Quantity	FI Amount	Percent of FI Counts From Clinic
07	05	5	$223.92	11.63%
	30	19	$437.77	44.19%
	39	2	$106.41	4.65%
	42	14	$399.01	32.56%

Figure 174 - Sample of Vendor Food Cost – Issuing Agency Analysis Report

Figure 173 - Vendor Food Cost – Issuing Agency Analysis

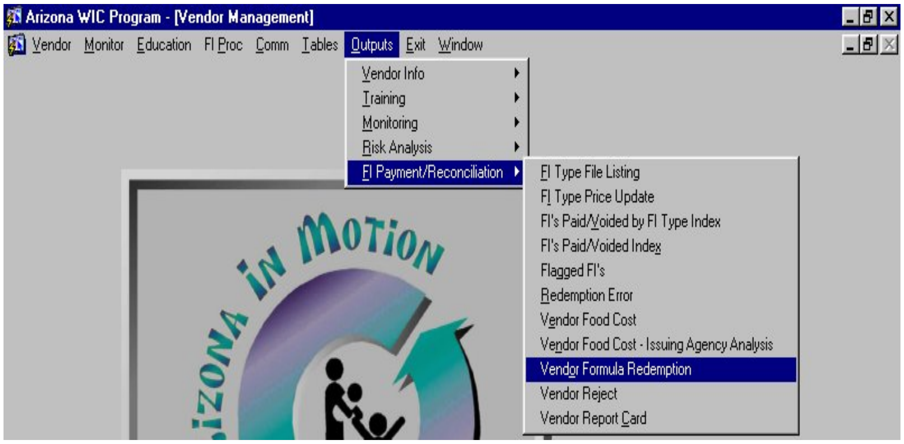
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - The user may chose the type of report generated – State Summary, Local Agency/Clinic Detail, or Local Agency/Clinic Detail and State Summary.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Month - The fiscal month which will be queried for food instrument reconciliation.

Producing a Vendor Formula Redemption Report

To Produce a Vendor Formula Redemption Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on Vendor Formula Redemption as shown below:



The Vendor Formula Redemption parameter window is displayed:

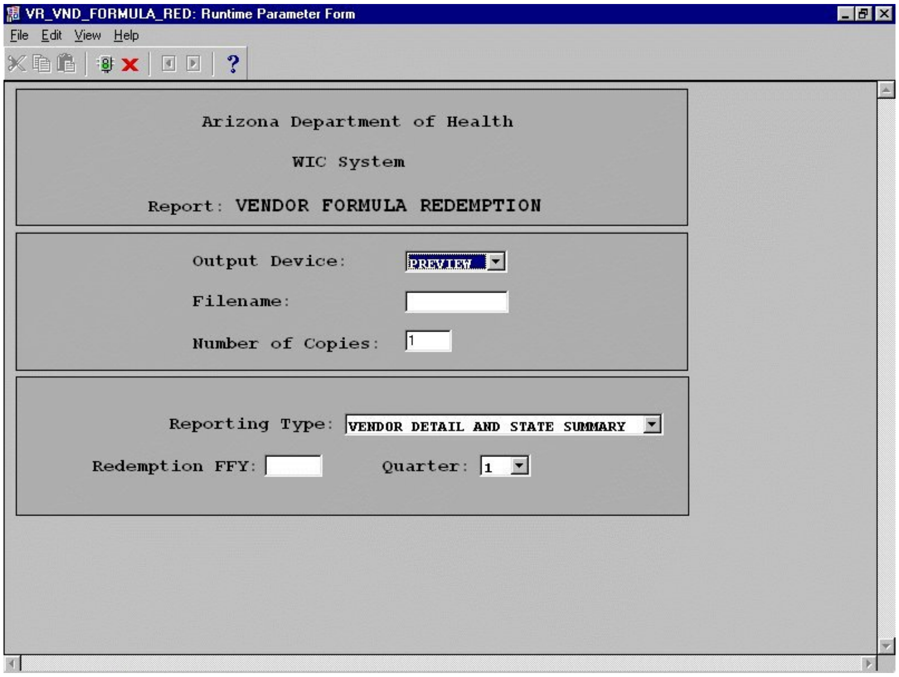


Figure 175 - Vendor Formula Redemption

Creating a Vendor Formula Redemption Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the reporting type using the drop down list.
5. Type in a 4 digit year in the redemption FFY year field.
6. Select the quarter from the drop down list.
7. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

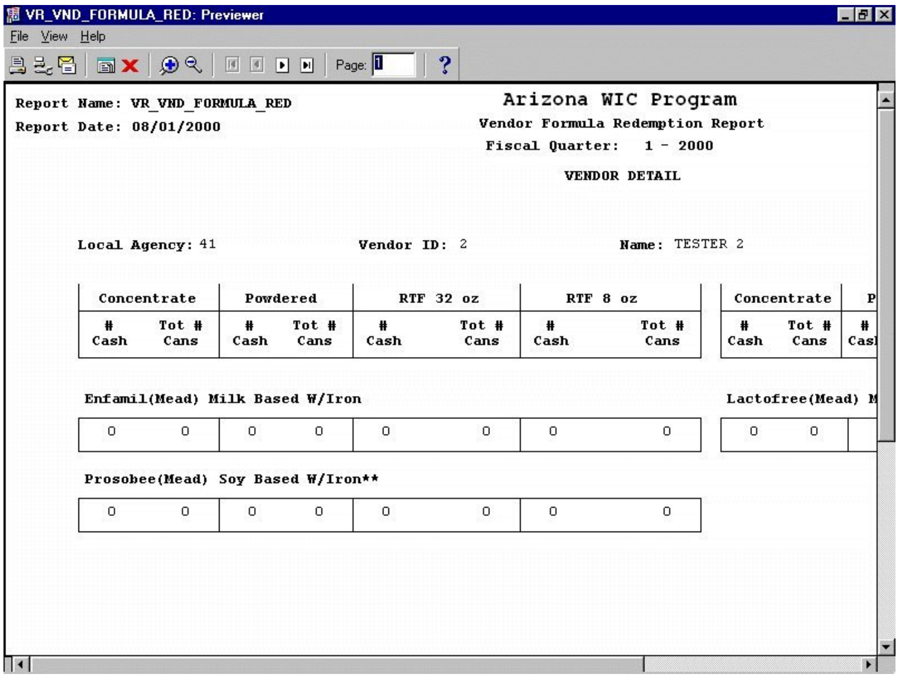


Figure 176 - Sample of Vendor Formula Redemption Report

Figure 175 - Vendor Formula Redemption

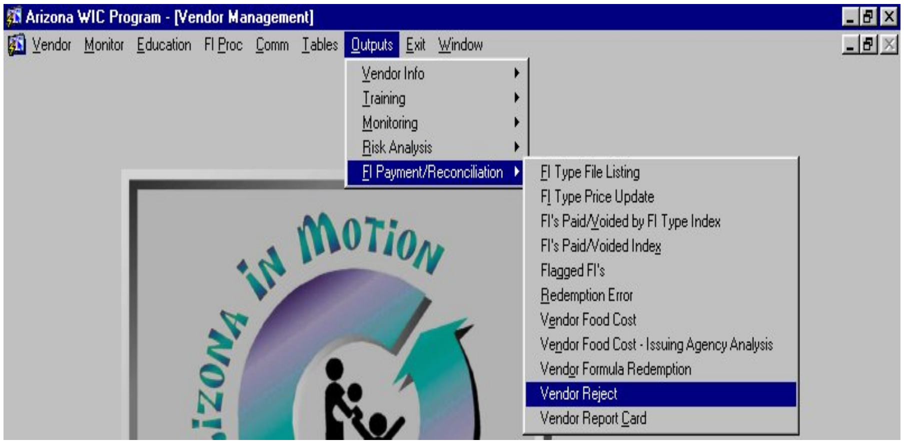
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Reporting Type - Allows the user to select the Vendor Detail, State Summary, or both.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Quarter - The fiscal quarter which will be queried for food instrument reconciliation.

Producing a Vendor Reject Report

To Produce a Vendor Reject Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on Vendor Reject as shown below:



The Vendor Reject parameter window is displayed:

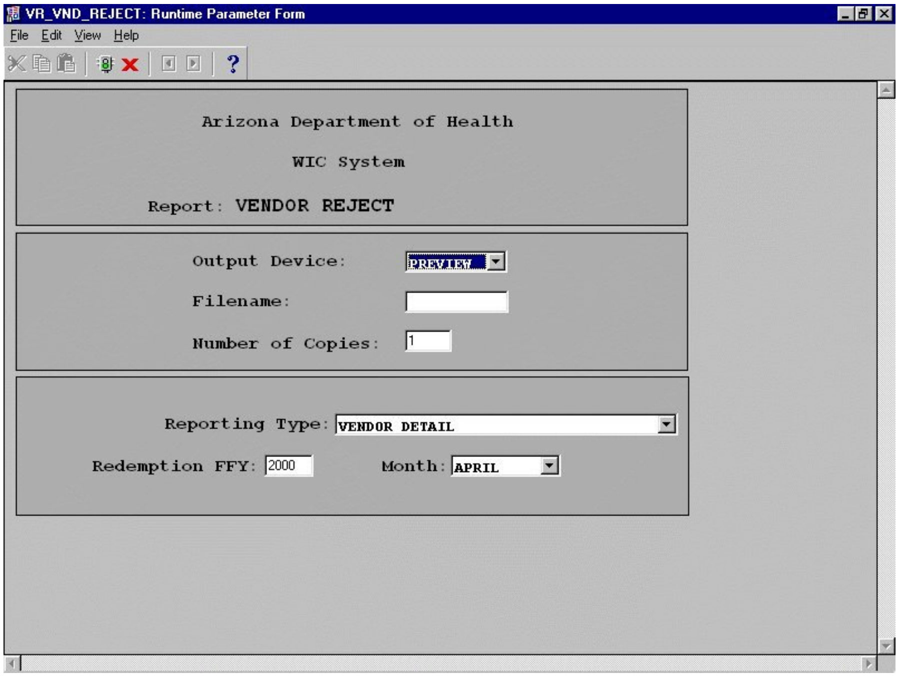


Figure 177 - Vendor Reject

Creating a Vendor Reject Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the status of the Vendor from the drop down on the right.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

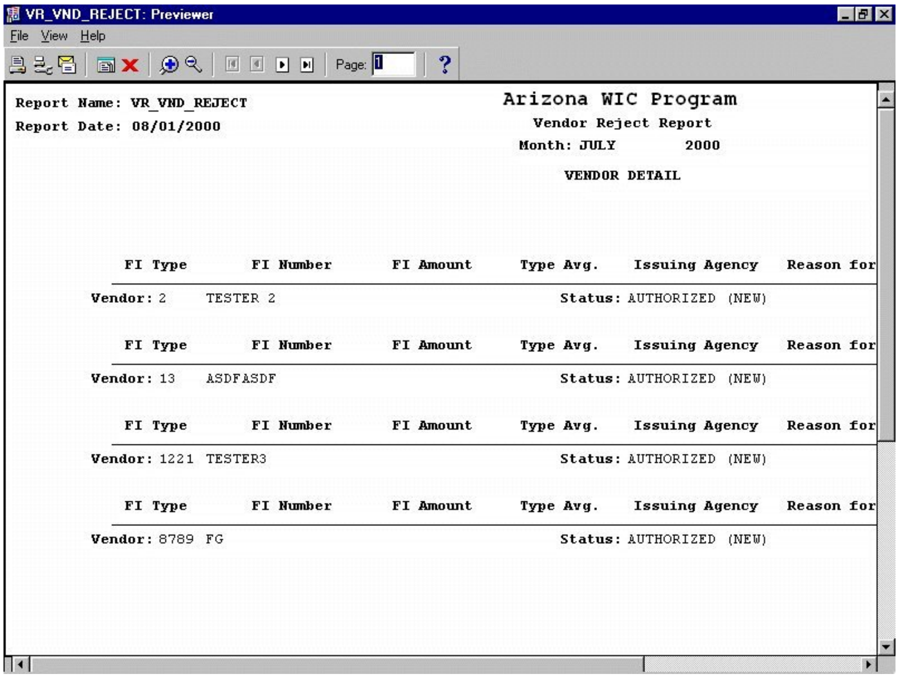


Figure 178 - Sample of Vendor Reject Report

Figure 177 - Vendor Reject

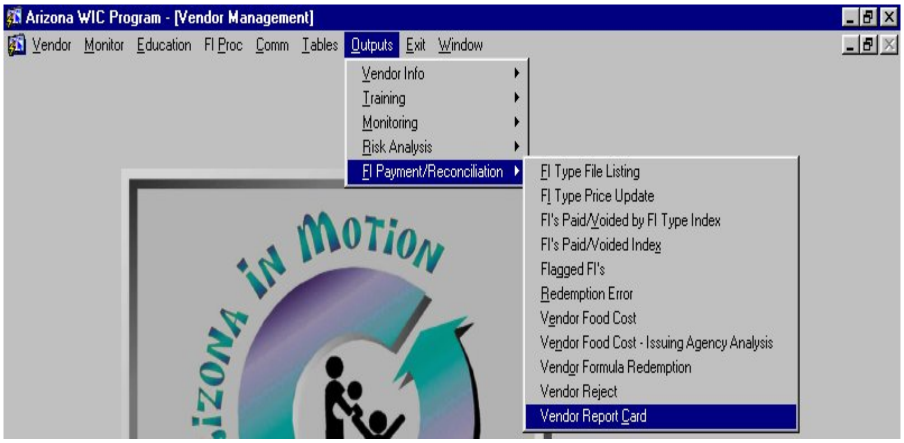
Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Reporting Type - Allows the user to select the Vendor Detail, State Summary, or both.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Month - The fiscal month which will be queried for food instrument reconciliation.

Producing a Vendor Report Card Report

To Produce a Vendor Report Card Report:

1. Click on Outputs from the menu bar.
2. Click on FI Payment/Reconciliation.
3. Click on Vendor Report Card as shown below:



The Vendor Report Card parameter window is displayed:

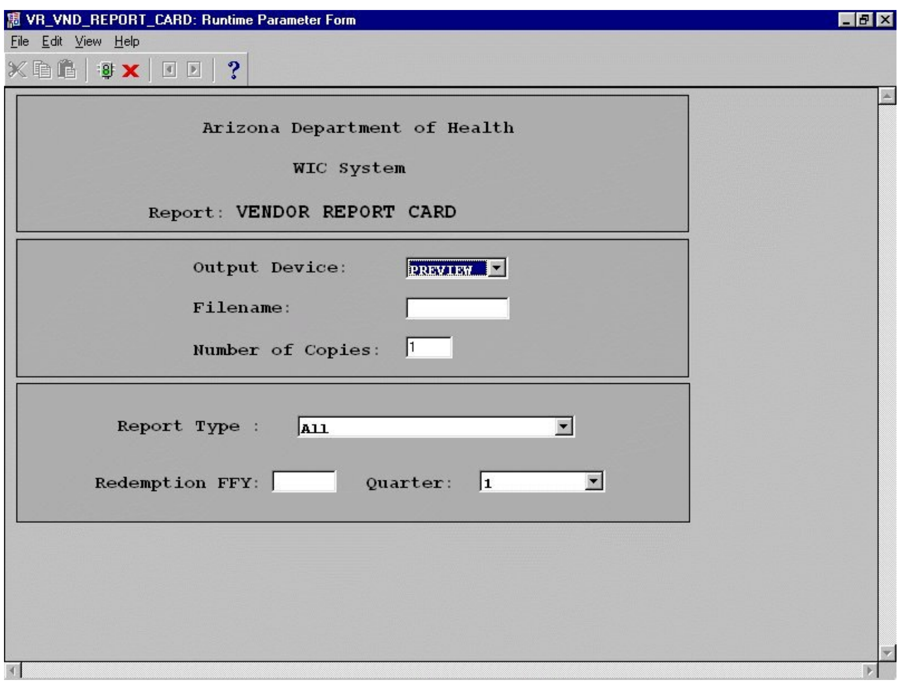


Figure 179 - Vendor Report Card

Creating a Vendor Report Card Report

1. Click the arrow to the right of the Output Device field to show a list of valid values and select the output device at which to print the report by clicking that device name.
2. If the report is to be sent to a file, enter a filename to which the report being generated will be sent.
3. Select the number of copies of the report to print by typing that number in the Copies field.
4. Select the status of the Vendor from the drop down on the right.
5. If Display was selected as the Output Device, click the green light icon to bring up the preview screen shown below. Otherwise, the report is processed per the Output Device selected.

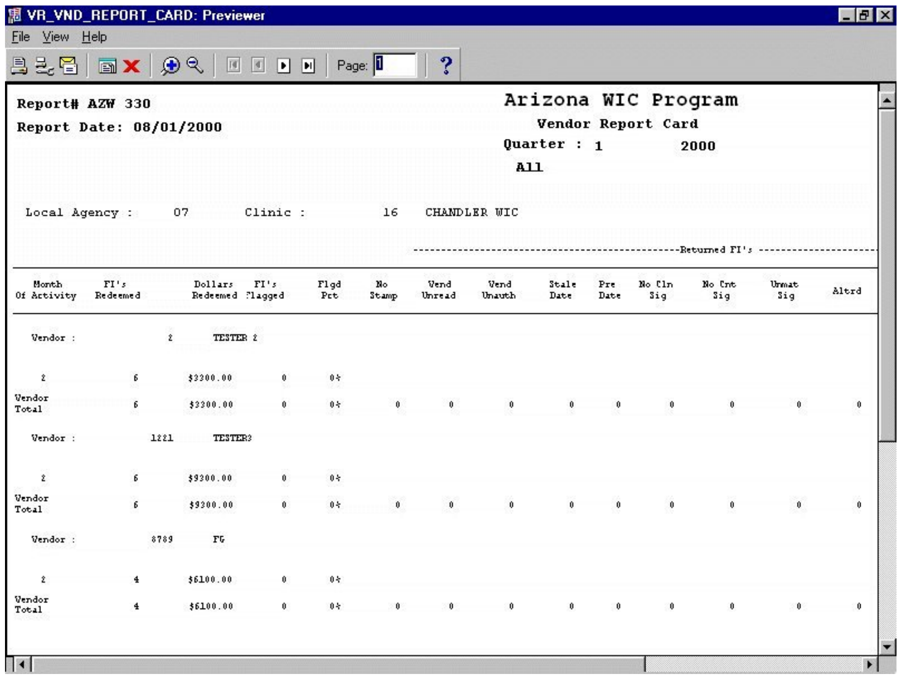


Figure 180 - Sample of Vendor Report Card Report

Figure 179 - Vendor Report Card

Fields

Output Device - The user may select (from a drop down list) screen, file, printer, mail, or preview.
Filename - If file is selected (above), the directory and filename are entered.
Number of Copies - If printer is selected (above), the number of copies desired is entered.
Report Type - Allows the user to select the Vendor Detail, State Summary, or both.
Redemption FFY - The Federal Fiscal Year which will be queried for food instrument reconciliation.
Quarter - The fiscal quarter which will be queried for food instrument reconciliation.

Table of Figures